

MONTANA ASSOCIATION OF SCHOOL BUSINESS OFFICIALS



Empowering School Business Leaders Through Education

JULY 2022

PREPARING FOR MAEFAIRS WEBINARS

JULY 6: 9:30AM-12:00PM

JULY 7: 9:30AM-12:00PM

We hope you can join us for our MASBO webinars presented by Steve Hamel:

[Preparing for MAEFAIRS Trustee's Financial Summary](#)

Wednesday July 6: 9:30am – 12:00pm

[Preparing for MAEFAIRS Budget](#)

Thursday July 7: 9:30am – 12:00pm



Cost per attendee: \$40 for one webinar or \$75 for both

Registered attendees will receive instructions to join webinar(s) the day before.

The webinars will not be recorded

MASBO Membership

Invoices have been sent out! If you did not receive it, or if you have any questions, please feel free to reach out to [Marie](#).

For new members , please complete an online membership application: [MASBO Membership](#)

Remember, membership is open to all those working in the business management of schools, including payroll, human resources, accounts payable, operations and school foods, just to name a few.

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>Shay Baize</u> , Lima
Ex-Officio, MTSUIP	<u>Jen Mettler</u> , Baker K-12	Region 5 Director	<u>Rebekah Rhoades</u> , Lewistown
Ex-Officio, OPI	<u>Barb Quinn</u> , School Finance Sr. Manager	Region 6 Director	<u>Stacy Montgomery</u> , Forsyth

MASBO Staff

[Shelley Turner](#)
Executive Director
406-461-3659

[Marie Roach](#)
Association Services Coordinator
406-461-8804

[Steve Hamel](#)
Interim Services/Trainer
406-431-0124

STRIKE IT RICH- MASBO SUMMER CONFERENCE

WRAP-UPS and RECOGNITIONS



Thank you to everyone who was able to join us at Summer Conference in Butte Montana. It was wonderful to see everyone in person, reconnect, learn, and recharge our batteries. We want to thank everyone for their enthusiasm, engagement and participation.

2022 MASBO SUMMER CONFERENCE & NEW CLERK ACADEMY EVALUATION

If you have moment, please consider filling out our survey about Summer Conference. We are always considering new ideas to improve and grow, and your reflections are an important part of the process.

We'd like to share some of the awards announced at conference this year, for all of those who were not able to attend. We are so proud of our members and we feel it's important to honor their accomplishments again.

OUTSTANDING BUSINESS OFFICIAL AWARD

Janelle Mickelson- Helena

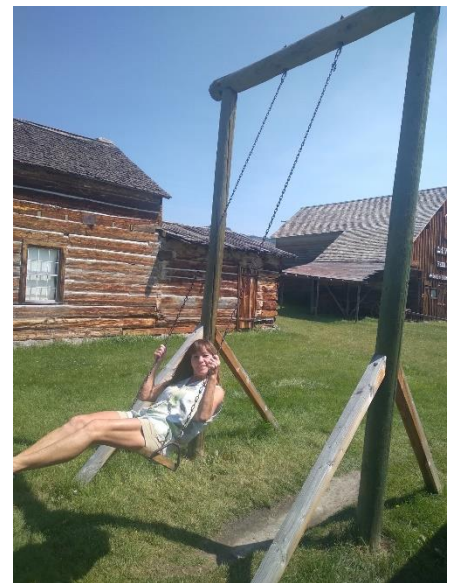
Janelle Mickelson has been a member of MASBO for over 15 years, and holds over 24 years of experience in school business. She has worked with several districts as a business manager and district clerk, Board Trustee, and has also served at the Office of Public Instruction. Janelle is a licensed CPA and has taken on an active role in numerous trainings and organizations, sharing her knowledge and support to others in the industry.

While working as a business manager, Janelle has worn numerous hats. She has been a driver for student activities and field trips, a ticket taker at sporting events, and provided an outlet and connection to troubled students through a suspension monitor program. In addition to her service to the schools of Montana, Janelle has given back in numerous other fashions including coaching youth baseball, facilitating taekwondo training for youth, and serving the homeless Thanksgiving dinner at a local shelter. Janelle is committed to her family, community, and school in so many ways and we are honored to celebrate her.

Her nominees wrote the following about Janelle:

“Janelle combines compassion and care for her employees with the direct and honest approach one wants from a financial leader.... I couldn't ask for a better Business Services Administrator.” – Rex Weltz, Superintendent, Helena Public Schools.

“Janelle is known for her honesty and integrity.... her lifelong commitment to public education, her impeccable reputation throughout our state, and the way in which her quiet strength and candor inspire



those around her to stand up tall and do everything possible for our kids.”- Luke Muszkiewicz, Helena Public Schools Board Chair and President of the MTSBA Board of Directors.

“Ms. Mickelson is a natural leader....someone who leads by example; consistently treats everyone with respect, generosity, and kindness; is willing to help out and take on any challenge; is positive, uplifting and passionate about her work; always takes time to answer questions; runs the business office like an extended family; and is a huge advocate for the Helena School District.”- Siobhan K. Hathorn, Helena Public Schools Board Vice Chair.

Congratulations Janelle!!! Janelle has received a lifetime membership to MASBO, a beautiful crystal award to display and MASBO apparel. Janelle will also be recognized during MCEL in October and the SAM evening of Excellence in June.

The Outstanding School Business Official Award recognizes the indispensable role school business officials have in educating children. A nomination means your colleagues believe you are committed to the students, staff, taxpayers and members of your community, and for your contribution to MASBO. This year we had SIX nominees for the Outstanding Business Official Award. Way to promote our team everyone!!! Below is our list of nominees for 2022. Congratulations!!!

Merridy Gauthier (Columbus)
Heather Mumby (Cayuse Prairie)
Trinette Todd (Troy)

Belinda Klick (Sun River Valley)
Mary Smith (Cabinet Mountain Cooperative)

RETIRING MEMBERS

2022 Retirees:

Region 1	Gwyn Andersen (KalisPELL)
Region 2	Nona Coughlan (Belt)
Region 2	Betty Brumwell (Dutton/Brady)
Region 2	Sherri Bergstrom (Hobson)
Region 4	Carol Williams (Lincoln)
Region 5	Patti Bruner (Ryegate)
Region 5	Janice Ripley (Shepherd)

MONTANA CERTIFIED SCHOOL BUSINESS OFFICIALS

Certification:

MCSBO	Julie Jones (Laurel)
MCSBO renewal	Deb Anderson (Polson)
MCSBO renewal	Rita Huck (Huntley Project)

YEARS OF SERVICE

Each year we also like to honor those who have reached milestones in their membership. Each member receives a Pin on their milestone year.

10 Year Pins		
Melissa	Bohn	Winnett
Vivian	Charlson	Benton Lake
Linell	Chief Sky	Rocky Boy
Maryetta	Engle	Big Sandy
Cindy	Gonzalez	Augusta
Emily	Hansmann	Pendroy
Joyce	Harvey	Froid
Laurie	Hickethier	Elysian Elem
Rhonda	Lahaye	Shields Valley
Becky	Larsen	Sheridan
Stacy	Montgomery	Forsyth/Kircher
Jeannie	Morgan	Lone Rock
Kevin	Patrick	Butte
Rebekah	Rhoades	Lewistown
Nicole	Thuotte	OPI
20 Year Pins		
Lenore	Bricco	Miles City
Pam	Clary	Polson
Ann	Econom	Winifred
Carrie	Fisher	Belgrade
Merridy	Gauthier	Columbus
Cindy	Hecker	Rau
Gail	Karls	Molt
Marlene	Krum	HuntleyProject
Sarah	Stewart	Pryor
Mike	Waterman	Bozeman
Stephanie	Zindler	Rapelje
30 Year Pins		
Nicole	Beyer	Sidney
Cathy	Binando-Jones	Hamilton
Teresa	Cornell	Harlem
Robert	Martelle	S H
Brian	Patrick	Great Falls
Sandy	Watkins	NCLRC
Denise	Williams	Kalispell



P-CARD AWARDS



P-Card Highest Purchases:

5th Polson- \$1,127,621.00
4th Anaconda- \$1,354,710.15
3rd Sidney- \$1,486,807.10
2nd Havre- \$1,973,960.78
1st Helena- \$2,508,123.53

Cooperative with Highest Purchases:

Bitterroot Valley- \$65,906.57

P-Card Highest Purchases per ANB:

5th Reed Point- \$2,683.38
4th Fishtail- \$2,942.89
3rd Hot Springs- \$3,007.73
2nd Ekalaka- \$3,019.03
1st Colstrip- \$3,581.38

P-Card by the Numbers:

Rebate growth from prior year- \$139,629.64
Total Purchases- \$36,901,712.00
Purchasing Districts- 178, up from 169 last year.
Percentage of returns- 1.1% to 1.5%
You can access the Rebate Schedule Distribution List
[here.](#)

IN CASE YOU MISSED IT

Click [here](#) to see several power point presentations that are posted on the MASBO website.

THANK YOU to the presenters who were willing to share their information with us.

SUNSHINE FUND

A HUGE thank you to everyone who donated items and baskets for our Sunshine fund silent auction. This fundraiser is held annually in support of a MASBO member. This year, our membership raised **\$2,210.00!!!** These funds have been sent to Carol Williams, formerly of Lincoln schools. Thank you to Bunky Wirtz for managing the event and to all the amazing members who contributed.



Congratulations to Marisa Collins from Nashua (new clerk drawing), and Colestrip School District (p-card drawing). They won the two drawings for free registration to summer conference 2023!

Please see a list of our generous summer conference sponsors, exhibitors and partners on [page 9.](#)

UPCOMING OPPORTUNITIES

MARK YOUR CALENDARS FOR 2023 & 2024 SUMMER CONFERENCE

June 12-16, 2023 at the Fairmont Hot Springs Resort

Call 800-332-3272 and ask for the MASBO room block or
Book online at fairmontmontana.com and enter Group Code 25248

Click 'Book Now' (upper right)

Click 'Group Code' (top/center)

Enter '25248' to bring up our room block dates

June 10-14, 2024 at the Billings Hotel & Convention Center

Room blocks are now available at Fairmont Hot Springs and they get filled up fast so don't hesitate.

OPI E-Grants Tour Tentative Summer Schedule

OPI has recently released a tentative summer schedule for the E-grants tour. More information and registration links will be provided soon and listed on the OPI [Compass](#) site.

July 18th- Laurel July 19th- Glendive July 20th- Glasgow July 21st- Lewistown

July 26th- Evergreen (Kalispell) July 27th-Target Range July 28th-Mahattan

August 10th- Online Virtual

Districts that are attending will need to bring a wi-fi enabled laptop, enrollment numbers, low-income counts, homeless numbers, and CEP statuses. For more information, please contact Sheri Harlow at sharlow@mt.gov or 406-444-5660.

From ASBO International



[Register Now for AC&E22!](#)

[Register today](#) and join a powerhouse of school business professionals in Portland, Oregon, September 14–17, to sharpen your ideas, share proven solutions, and confirm the value of community at ASBO International's Annual Conference & Expo.

Use the [Build Your Case Toolkit](#) to show your supervisor exactly how your attendance will yield a significant return on the investment. This event is one your district can't afford to miss!

Please let [Shelley](#) know if you are going to ACE so we can keep you connected with the Montana Delegation.



Join us! October 19-21, 2022 at the Hilton Garden Inn, Missoula

Registration is open!

[2022 MCEL - In Person](#)

or

[2022 MCEL - Virtual Only](#)

Please note - there is no hotel block at the Hilton Garden Inn.

Early Registration (June 1 – July 31)

Member - \$275

Non-Member \$375

Intern - \$175

Regular Registration (August 1 – September 30)

Member - \$300

Non-Member - \$400

Intern - \$200

Late Registration (October 1 through conference)

In-person registration closes October 7, 2022. Virtual registration closes October 17, 2022

Member - \$325

Non-Member - \$425

Intern - \$225

Virtual Unlimited District Option Virtual/Video Only

\$1,500 per district

Has Your District Experienced a Staffing or Board Member Change?

MASBO: If you are new to your position as business manager and/or clerk, or you anticipate changes please let the staff at MASBO know so we can also update your information. Please feel free to reach out to [Shelley](#) or [Marie](#) for assistance.

MTSBA: Please be sure to login to [MyMTSBA](#) and update your board members names, contact information and who is serving as Board Chair and Vice. Also, be sure to update any changes to other administrative roles. If you are having issues with this process, please contact [Wendy](#) or [Emily](#) for assistance.

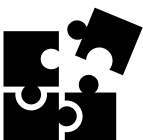
OPI: Changes to the board chair, clerk/business manager, superintendent, or principal should be reported to [OPI Contacts](#). Instructions for how to make these changes are found here: [Instructions](#). If you have questions about how to complete the updates, please contact: CentralUpdates@mt.gov

OTHER: Consider keeping a list of other memberships and/or logins your admin team holds. These could include School Administrators of Montana, cooperatives, vendors, other government sites, and email list serves that you and your team rely upon.

HANDY YEAR-END RESOURCES

OPI Spreadsheets and Other Resources

- Budgeting and Financials
 - [School Accounting Manual](#)
 - [Chart of Accounts](#)
 - [FY 2023 General Fund Budget Spreadsheet](#)
 - [Preliminary Title Funding Allocations](#)
 - [Technology Fund levy Spreadsheet](#)
 - [Projecting General Fund Reserves](#)
 - [Building Reserve Fund Guidance Document Revised May 2018](#)
 - [Preliminary Budget Data Sheets FY2023](#)
 - [School Safety Transfers Guidance](#)
 - [Multidistrict Agreement FAQs](#)
 - [Miscellaneous Fund Worksheet](#)
 - [Reconciling Cash to County Treasurer FY2023](#)
 - [Student Activity Fund Worksheet](#)
 - [Compensated Absences Worksheet](#)
 - [FY 2023 In District Special Education Permissive Levy Calculator](#)
 - [In District Special Education Permissive Levy Checklist](#)
 - [FY 2023 In District Special Education Permissive Levy Calculator - For Older Excel Versions](#)
 - [CSCT Certification Page](#)
- [E-grants Login](#)
- [MAEFAIRS Link](#)
 - [Budget Instructions](#)
 - [Budget Amendment Packet](#)
 - [TFS Revenue/Expenditure Upload Instructions](#)
 - [TFS Expenditure Upload Template](#)
 - [TFS Revenue Upload Template](#)
 - [TFS Additional Expenditure Upload Template](#)
- [Transportation Portal Link](#)
 - [Transportation Budgeting Worksheet](#)
 - [TR1 Bus Route Rollover](#)
 - [TR2 Bus Rider Form](#)
 - [TR4 Rollover Individual Contract Instructions](#)
 - [TR4 Individual Transportation Contract Form](#)
 - [Bus Inspection Form TR13](#)
 - [Bus Inspection Form TR13A](#)
 - [FP-14.1 Parent or District Student Attendance Agreement](#)



REMINDERS FROM OPI

Safe Return and LEA ARP Plans are Due Every Six Months

Safe Return and LEA ARP Plan (ESSER fund use) are required to be updated at least twice a year. OPI will review the plans in December and June. Districts have been notified of the need to review and update plans including requirement to engage the community. Instructions were issued out on the 2nd week of May but several districts are past the compliance deadline. If you did not receive the instructions or need assistance, please reach out to [Wendi Fawns](#) at OPI and she will assist you in reaching compliance. Updates require notice of plan update on the Board agenda, allowing for public comment and stakeholder engagement.

2022 Summer Conference Sponsors and Exhibitors

We couldn't hold Summer Conference without these amazing partners.

American Fidelity Assurance Company
Black Mountain Software
Bruco
C & C School Accounting
D.A. Davidson & Company
Dorsey & Whitney LLP
Empower
Horace Mann
Iconergy
Infinite Campus
Joint Powers Trust
Lifetouch National School Studios
Montana School Group Insurance Authority (MSGIA/WCRRP)
Montana Schools Property & Liability Insurance Program (MSPLIP)
Montana Schools Unemployment Insurance Program (MTSUIP)
Montana Unified School Trust (MUST)
MPERA
Natural Essentials



MASBO
Montana Association of
School Business Officials

MFPE
Montana Federation
of Public Employees

MQEC
Montana Quality
Education Coalition

MREA
Montana Rural
Education Association

MTSBA
Montana School Boards
Association

SAM
School Administrators
of Montana

Red Rover
School Services of Montana

MTPEC "Did You Know"...Telling Your Story of Personalized Learning and Innovations

"Did You Know"...Telling Your Story of Personalized Learning and Innovations is a Montana Public Education Center statewide effort to collect information about our public schools. We know that the value our schools bring to local communities enrich the lives of not only our students, but our communities and entire state. Statistical information about student performance, and financial information about our schools, tells only a part of the story, and our ability to "Tell Our Story" is so important in providing a deeper, more meaningful look at the value of our public schools. So, join this effort to describe the many ways our schools are making a difference in our communities for our children.

The information collected can then be used by all of us to "Tell Our Story" to audiences that want to know more about the value of our schools. The stories will be collected and made easily accessible, electronically, for you to share with others.

If you have a personalized learning and/or innovative program, project, activity or event that you want to share with others, please take a moment to complete and submit this electronic [DID YOU KNOW](#) form. If there are materials you would like included (e.g., documents, photos, video), you will have the ability to upload them below. You can submit this form multiple times for programs/projects in the Categories described in this form. Please do not submit personally identifiable student information and obtain FERPA compliant permissions for any photo or video with students present.

Thanks for sharing!

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Lance Melton
MTSBA
lmelton@mtsba.org

Kirk Miller
SAM
samkm@sammt.org

MASBO ENDORSES THESE PROGRAMS

	<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>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>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>Montana Schools Unemployment Insurance Program Theresa LeSueur, Director 406-457-4407 tlesueur@mtsba.org http://www.mtsuip.org/</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

American Fidelity Assurance Company Jacob Bautista, Office Manager jacob.Bautista@americanfidelity.com	Anderson, Zurmuehlen & Co. Stefeni Freese, CPA sfreese@azworld.com	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
Frontline Education Lisa Sierra lsierra@frontlineed.com	Horace Mann Keith Jorgensen keith.jorgensen@horacemann.com	Iconergy Carl Hurst churst@iconergyco.com
Infinite Campus Mariah Ristow mariah.ristow@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	Kalmbach Consulting Cathy Kalmbach cathymkal@gmail.com	Klimas Financial Services, Inc. Charles Klimas cklimas@gwnsecurities.com
Montana Public Employees Retirement Administration Terry Dalton tdalton@mt.gov	MSGIA-WCRRP Shawn Bubbs 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	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	Teachers on Call Lesley Hacker Lesley.hacker@teachersoncall.com	Tyler Technologies Carrie Hughes carrie.hughes@tylertech.com
Wipfli LLP Kim Dare, CPA kdare@wipfli.com	<p style="text-align: center;"><i>Today I will do what others won't so tomorrow I can accomplish what others can't.</i></p> <p style="text-align: center;">Jerry Rice</p>	

IMPORTANT DATES & DEADLINES - JULY 2022

JULY 1

First day of fiscal year	The school fiscal year begins on July 1 and ends on June 30	MCA 20-1-301
First day to advertise budget meeting	Between July 1 and August 10 of each year, the clerk of each district shall publish a notice of the annual budget meeting.	MCA 20-9-115 OPI Budget Timeline (scroll down the page to see chart)
Individual transportation contracts (TR-4) are due to the County Superintendent and to the Office of Public Instruction	A school district must complete and sign a TR-4 Individual Transportation Contract (3 copies) for the ensuing year. Send to the county superintendent and submit electronically to the OPI.	MCA 20-10-121 MCA 20-10-124 A.R.M. 10-7-101(2)(b) Regulations & Guidelines for Pupil Transportation Reporting
Last day to send bus contracts to the county superintendent	By July 1, a district must send copies of all completed school bus contracts to the county superintendent.	MCA 20-10-125 A.R.M. 10.7.101(2)(a)
School Bus Stop Arm Requirements are in Effect	<p>When a school bus route includes a bus stop that requires a child to cross a roadway, the school bus must be equipped with an extended stop arm that partially obstructs the roadway. A school child may not cross a roadway to enter or exit from a school bus unless the roadway has been partially obstructed by the extended stop arm. Extended Stop Arm must:</p> <ul style="list-style-type: none"> • Be equipped with additional flashing red lights as specified in 61-9-402, MCA; • Be capable of extending a distance of at least 54 inches from the school bus; and • Be at a height of not less than 36 inches. <p>Extended Stop Arm should have an additional illuminated stop sign located at the furthest distance from the school bus.</p>	2022 Montana School Bus Standards Publication

JULY 10

Traffic Education TE06 Year-End Reports due to OPI.	<p>TE06 Year-End Reports are due before July 10 for traffic education courses that ended between July 1, 2021 and June 30, 2022.</p> <p>Reimbursements for eligible students will be paid in August. The estimated payment is \$100 per student, but this number is dependent on the total number of students being reimbursed statewide and the percentage of driver license</p>	Form TE06 OPI Traffic Education Forms and Reports
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IMPORTANT DATES & DEADLINES - JULY 2022

	<p>fees received by the OPI for disbursement to school districts. We won't know the exact amount until late July and will send out an email to school district staff with the final payment information when the reimbursements have been processed.</p> <p>If you need assistance to complete and submit your TE06, send an email to Dwight.Nelson@mt.gov or call 406-444-4396.</p>	
JULY 15		
CSCT payment for June Claims due to OPI no later than July 15 th .	CSCT funds submitted to OPI within window of 10 business days from receipt of match amount due.	CSCT Certification Form-Access.gov CSCT IGT Timeline CSCT Access.gov Manual A.R.M. 37.87.1803 Accounting Guidance
JULY 20		
County treasurer provides statement of cash balances and bond information	County treasurer provides bond, endowment fund and cash balances for school trustees' financial summary (TFS) and cash balances for county school funds supported by countywide levies.	MCA 20-9-121 MCA 20-9-604(5) OPI Budget Timeline (scroll down the page to see chart)
JULY 25		
County transportation committee must meet to approve bus routes and additional payments on individual transportation contracts by the fourth Monday in July	A county transportation committee (CTC) must act to approve or not approve all bus routes established by districts. The CTC must also act on all applications for increased individual payments due to isolation. Approval of board of trustees for increased payments is required prior to CTC action.	MCA 20-10-132 A.R.M. 10.7.101(2)(c)
JULY 25		
Grant cash request due to OPI	Grant cash requests made by this date will be paid on August 10.	OPI State and Federal Grants Handbook
CSCT Payment to Districts	If the District submitted June claims to MMIS prior to June 25 th , the CSCT payment schedule notes schools should expect payment on July 25 th .	CST Monthly IGT Timeline MCA 20-9-240
JULY 31		
Form 941 for Quarter 2 is due	Form 941 payroll report for Quarter 2 (April, May, June) is due.	Form 941 Form 941 Instructions
Last day to liquidate funds for grants that ended June 30	Last day to liquidate funds for grants that ended June 30: <ul style="list-style-type: none"> • ABLE Extension • ABLE, EL Civics • State ABLE 	OPI State and Federal Grants Handbook

	<ul style="list-style-type: none"> • Carl Perkins and Technical Education • Title IV, 21st Century Community Learning Centers • Indian Education for All • In-State Facilities: Significant Needs Schools • Pre-School Development Grant 	
At least 30 days prior to first semester of the new school year		
1st Semester Bus Inspections must be completed	<p>Use form TR-13 Bus Inspection for inspections of yellow school buses.</p> <p>Use form TR-13A Bus Inspection for inspections of Type E buses.</p> <p>The Highway Patrol must inspect (a re-inspect, if needed) the buses prior to the beginning of first semester.</p>	MCA, 20-10-101(4)(a)(i) Regulations & Guidelines for Pupil Transportation Reporting (see page 4) TR13 Instructions TR13 Form-Blank TR13A Form-Blank

IMPORTANT DEADLINES – AUGUST 2022		
AUGUST 1		
1st Semester Bus Inspections must be completed. <i>within 30 days prior to the beginning of the school term</i>	<p>Use form TR-13 Bus Inspection for inspections of yellow school buses.</p> <p>Use form TR-13A Bus Inspection for inspections of Type E buses.</p> <p>The Highway Patrol must inspect (a re-inspect, if needed) the buses prior to the beginning of first semester.</p>	MCA, 20-10-101(4)(a)(i) Regulations & Guidelines for Pupil Transportation Reporting (see page 4) TR13 Instructions TR13 Form-Blank TR13A Form-Blank
AUGUST 1		
Taxable valuation is available from Department of Revenue	The Department of Revenue (county assessor) delivers taxable valuation information to the county superintendent of schools.	20-9-122, MCA OPI Budget Timeline (scroll down the page to see chart)
AUGUST 8		
(second Monday in August) County superintendent computes revenue for transportation budget	County superintendent computes revenue available to finance the transportation budget	20-10-144, MCA OPI Budget Timeline (scroll down the page to see chart)
AUGUST 10		
Deadline for publishing a notice of budget meeting	Between July 1 and August 10, the district clerk must publish one notice of the date, time and place of the annual budget meeting in the local or county newspaper that the trustees of the district determine to be the newspaper with the widest	20-9-115, MCA OPI Budget Timeline (scroll down the page to see chart)

IMPORTANT DEADLINES – AUGUST 2022

	<p>circulation in the district. Include the following information in your notice:</p> <ul style="list-style-type: none"> • date, time, and place that the trustees will meet for the purpose of considering and adopting the final budget of the district • state that the meeting of the trustees may be continued from day to day until the final adoption of the district's budget • stating that any taxpayer in the district may appear at the meeting and be heard for or against any part of the budget 	
Final Expenditure Reports for grants ended June 30, 2022 due	<p>Final Expenditure Reports for the following grants are due by August 10:</p> <ul style="list-style-type: none"> • ABLE Extension • ABLE, EL Civics • State ABLE • Carl Perkins and Technical Education • Title IV, 21st Century Community Learning Centers • Indian Education for All • In-State Facilities: Significant Needs Schools • Pre-School Development Grant • Any other Grants ending on June 30th 	<p>OPI State and Federal Grants Handbook</p> <p>State and Federal Grants Handbook Section 400 Accounting and Reporting Procedures (see 400.8 Project Closeouts)</p>
AUGUST 15		
OPI Form FP-8 due	Located and non-located counties exchange information between August 10 and August 15 in order to determine what percentage of the joint district their county supports.	<p>20-9-151, MCA OPI Budget Timeline (scroll down the page to see chart)</p>
Trustees Financial Summary (TFS) due to county superintendent	Trustees report annual financial activities of each fund maintained by the district to the county superintendent.	<p>20-9-213(6), MCA OPI Budget Timeline (scroll down the page to see chart)</p>
TFS for joint school districts due to county superintendents	Annual fiscal reports for joint districts must be submitted to the county superintendent of each county in which the part of the joint district is situated.	<p>20-9-213(6), MCA OPI Budget Timeline (scroll down the page to see chart)</p>
AUGUST 20		
(on or before August 20) Annual Final Budget Meeting	Trustees meet to consider all budget information and any attachments required by law.	<p>20-9-131(1), MCA OPI Budget Timeline (scroll down the page to see chart)</p>
AUGUST 25		
(not later than August 25)	<p>Trustees adopt final budget.</p> <p>Trustees of a joint district shall adopt a budget according to school budgeting laws and send a</p>	<p>20-9-131(2), MCA</p> <p>20-9-151(1), MCA OPI Budget Timeline</p>

IMPORTANT DEADLINES – AUGUST 2022		
	copy to the county superintendent of each county in which a part of the joint district is located.	(scroll down the page to see chart)
Grant cash request due to OPI	Grant cash requests made by this date will be paid on September 10.	OPI State and Federal Grants Handbook
AUGUST 26		
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 State Special Education Payments Technology Funding Transportation Pre-Payment	FY2023 Payment Schedule scroll to bottom of page
AUGUST 28		
(within 3 days of final adoption of budget; not later than Aug. 28) Deliver adopted budget to county	Upon final approval of budgets, trustees deliver adopted budget, including amounts to be raised by tax levies, to county superintendent.	20-9-131(3), MCA OPI Budget Timeline (scroll down the page to see chart)



WELLBEING

IN THE GREAT OUTDOORS

Summer is around the corner, and more people are taking to the outdoors to connect with nature, their families, and communities.

Montana is an Outdoor Paradise

Montana is home to **2 National Parks, 55 State Parks, and roughly 17 million acres of forest service land.** These areas provide a playground for residents and tourists alike with stunning views, epic hikes, and wildlife galore. With this in mind, it is important to remember the following tips and safety protocols.

Wildlife Safety

Although many of these furry friends are adorable and may appear friendly, it's important to remember wildlife is WILD.

- View wildlife from the safety of your car or from a safe distance. Stay at least 100 yards away from bears and at least 25 yards away from all other wildlife.
- Never approach, touch, or feed wildlife.
- Let wildlife know you are nearby. Hike in groups, make noise, carry bear spray and stay on designated trails.

Leave No Trace.

No matter where you get outside, it is yours to protect. Leave no trace helps reduce our impact on places we love. Keep these things in mind next time you get outside:

- By planning and preparing for your outdoor adventure, you can ensure a safe and enjoyable experience.
- Stay on established trails and set up camp in established locations.
- Pack it in, pack it out. By disposing of waste properly you avoid luring wildlife.
- Leave what you find.
- Keep campfires small and under control. Never leave a fire unattended.

When recreating outdoors, stay 100 yards away from bears and 25 yards away from all other wildlife.



"There are many physical and psychological benefits of nature that scientists have observed, which can better help us understand how nature supports wellness in the body, mind and community."

-MICHELLE KONDO

Research social scientist with the USDA Forest Service's Northern Research Station

Benefits of Being Outdoors

The physical and psychological effects of nature are immense.

Being outside supports an active and healthy lifestyle, which increases life expectancy, improves sleep, and reduces cancer risk. Studies show that natural outdoor environments are more enticing for physical activity and are more likely to motivate people to exercise.

Spending time in nature can restore and strengthen our mental capacities by increasing focus and attention. Bolstering mental wellness can lower the risk of depression and promote faster stress recovery.

Another major component of mental health is social connection. The outdoors is a confluence of friends, family and community.

The bottom line is that when you step outside to explore, there are many benefits to be had.



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Five ways to ensure a productive visit with a benefits consultant.

For employees who want to have a productive visit with a benefits consultant, being prepared is the most important thing they can do. With some preparation, you can focus on the information you need from the consultant, clear up any questions or confusion you're facing, and feel more prepared for the future.

1. Understand Your Coverage

Understanding your major medical, dental and vision coverage (your "core benefits"), is the first step toward a good benefits consultant visit. When you understand your core benefits, you can consider any gaps in your plan that might need to be filled in with supplemental insurance. Then you can come to the visit with any questions you have. Medical coverage and deductibles can be confusing, so check with your consultant about how to identify the right coverage for you.

[How to create benefits checklist so you can feel more prepared >](#)

2. Write Down Last Year's Medical Needs

When you write down your medical visits or prescription drugs you needed or used last year, you can consider whether those will impact your benefits this year. Based on what you used in the past, you may want to make some changes and adjustments to the benefits you're receiving. For example, if you don't understand whether your vision insurance covers a recently diagnosed eye condition, it's essential to find that out before or during your benefits appointment.

3. Consider Changes in Your Life

Be ready to talk about life changes. The kinds of changes that you experienced in your life in the previous year could impact changes for this year. If there's been a handful of changes in your life, you don't want to assume that your benefits will stay as is. In other words, if you [had a baby](#), [got married](#), or made a significant investment or financial move, you may need additional coverage options.

4. Know Your Goals

Get ready for the future by considering your short- and long-term goals. What you want to do in life can impact what you do with your benefits. For example, you may want to start up a side business, buy a home if you're currently renting or start saving for retirement. Making sure you're protected and managing your money and risk levels is important.

5. Bring All the Items You Need

Make sure you have what you need for your benefits appointment. That typically includes your driver's license and bank account information but may also include some specifics about your family. If you have unique situations, such as a spouse that's not a U.S. citizen, a child that's adopted, or anything else that makes your situation unique, bring appropriate documentation for your situation. It's better to be overprepared rather than missing required documentation during your visit. [Documents you should always keep up to date >](#)

The right benefits package matters, but so does the peace of mind that comes with knowing the benefits you have are the right ones for your needs, goals, plans, and dreams, both now and in the future.

[Seven questions and answers to know before open enrollment >](#)



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This information is intended to be educational. It is general in nature and should not be considered financial, legal or tax advice. Consult an attorney or a tax professional regarding your specific situation. This blog is up to date as of April 2022 and has not been updated for changes in the law, administration, or current events.