MONTANA ASSOCIATION OF SCHOOL BUSINESS OFFICIALS JUNE 2018

MASBO is dedicated to training and supporting the people responsible for business operations in Montana schools. Our goal is to enable members to manage the business in order to support education for Montana children.



MASBO Staff

Denise Williams, Executive Director 406-461-3659 or dwilliams@masbo.com Marie Roach, Administrative Assistant 406-461-8804 or mroach@masbo.com

MIKE WATERMAN NAMED 2018 OUTSTANDING SCHOOL BUSINESS OFFICIAL

Mike Waterman has been a business official and MASBO member for 16 years. Currently the Director of Business Services for Bozeman Schools, he's also worked at Lewistown Schools, Trinity Elementary and the Office of Public Instruction. He served on the MASBO Executive Board from 2008 - 2013 and earned his Montana Certified Business Official (MCSBO) designation in 2008. He's a past member of the Certification and Elections Committees and helped with New Clerk training during his tenure at OPI. He is the lead trainer for MASBO's Budget workshops and is a regular presenter at Spring Regionals, Veteran Clerks, annual Summer Conference and MCEL.



At the district level, Mike has conducted several successful General, Technology, Building Reserve, local bond, QZAB bond and land acquisition elections, achieved clean audits, led software conversion projects, participated in successful labor negotiations and earned the ASBO International Meritorious Budget Award for FY2016 - FY2018. He streamlined procedures in two districts, reducing business office FTE which allowed more money to be spent in the classroom. He has testified at several legislative hearings on issues important to his school district. He has participated in consensus groups and given numerous presentations to Bozeman and Lewistown community groups regarding annual ballot initiatives. Volunteer efforts include Speech and Debate judge, AA and B State Track Meet volunteer, Rotary Club member, Meals on Wheels and many more. He has served on several professional and community-based boards.

Many would agree that Mike's greatest contribution to his profession is his passion for sharing his knowledge and expertise with his fellow clerk/business managers, superintendents, trustees and community. School finance and budgeting, computer skills, bonds and capital project financing, succession planning, special education funding, taxable valuation, legislative changes and data analysis are just a few of the topics he's covered. He unofficially mentors numerous clerk/business managers around the state. He believes his efforts to train new clerks and superintendents contributes to their ability to be reliable, credible experts in their districts.

Here are some noteworthy comments from Mike's peers:

- * "At the forefront of all training sessions he reminds his audience that the purpose of schools is to educate children, never losing sight of that goal and making sure that others do not as well."
- ★ "Mike offers a helping hand to anyone, old or new to school business, that has a question about school finance."
- ★ "Anywhere a person should happen to go, Mike is well-known and respected."
- ★ "Mike is a natural leader, has a tremendous work ethic, and his knowledge of school finance is second to none."

CONGRATULATIONS, MIKE!

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 also for your contribution to MASBO. Congratulations to the following individuals who were nominated for the 2018 award!

Tane Knudsen, Malta

Judí Ward, Harrison

Míke Waterman, Bozeman

MASBO Board of Directors

President Cindy Foley, West Valley Schools
Vice-President Lorie Carey, Jefferson Co. High School
Past President Tammy Tulberg, Target Range Schools
Fiscal Agent Kim Aarstad, East Helena Schools

Ex-Officio, MTSUIP Denise Williams
Ex-Officio, OPI Kara Sperle

Region 1 Director Region 2 Director Region 3 Director Region 4 Director Region 5 Director

Region 6 Director

Noreen Anderson, Hellgate K-8 School Belinda Klick, Sun River Valley Schools Cheri Nygard, Wolf Point Schools Kevin Patrick, Anaconda Schools Rita Huck, Huntley Project Schools Jen Mettler, Baker Schools

SUPER IMPORTANT - - we need your feedback! SUMMER CONFERENCE AND NEW CLERK ACADEMY ATTENDEES:

If you haven't done so already, please complete the 2018 Summer Conference & New Clerk Academy Evaluations, including evaluations for individual sessions. Click here to get started!

2018 SUMMER CONFERENCE FOLLOW-UP

Thanks to all who were able to take time away from the office during the week of June 11 - 15 to join us in Billings for the *50 Years of MASBO* summer conference and New Clerk Academy. There were 193 attendees, 32 exhibitors and 60 presenters providing sessions on 53 different topics. Much learning, networking and FUN was had by all. Here are some highlights:

TRAINING SESSIONS

The Billings Hotel & Convention Center has ample meeting room space which allows us to provide conference attendees with a variety of training topic options each hour. New this year was a 2-hour class on governmental financial statements, two sessions on mindfulness, a Quickbooks user group meeting, a jam session for special education cooperative clerks and one on internal controls over expenditures. Back by popular demand was the small schools jam session, essential oils, MASBO Certification test preparation, several sessions for new clerks, excel spreadsheets you can use at work and roundtable discussions. MASBO's sponsors gave presentations on workers comp, DOL facility inspections, federal healthcare reform, health insurance trends and unemployment insurance. THANKS to all presenters for their time, effort and travel to make this year's conference a success.

SPONSOR AND EXHIBITOR SUPPORT

MASBO is extremely fortunate to have on-going support from our five major sponsors and several key vendor/exhibitors. These organizations help us with training on important topics and also provide financial resources for our meals, breaks, conference supplies, door prizes and social events. More information is found on page 8 of this newsletter.

MEMBERSHIP RECOGNITION AND AWARDS

At the Thursday luncheon and business meeting, the MASBO board of directors announced and presented membership pins for 10-year, 20-year and 30-year members, and recognized 6 retirements and 12 certification program achievements (see list on page 9 of this newsletter). The annual p-card rebate check amount was announced and awards were given to p-card districts that had the highest purchases overall and highest purchases per ANB. Mike Waterman was named the 2018 Outstanding Business Official and Judi Ward was honored for her perfect attendance record at the MASBO Annual Summer Conference: 35 years straight!

SUNSHINE FUND

Thank you to everyone who brought an item for the silent auction, bought surplus logo wear from the garage sale and/or donated cash. Your efforts and generosity brought in a total of *\$3,850.00*, which we will promptly forward to **Tammy Tulberg** of Target Range Schools. Also, thanks to **Bunky Wirtz** for organizing and handling this event each year.

IN CASE YOU MISSED IT

Click <u>here</u> to see several power point presentations and spreadsheets that are posted on the MASBO website. Many thanks to the presenters who were willing to share their information with us.

MASBO MEMORIAL SCHOLARSHIP FOR NEW CLERKS

The Clerk/Business Manager is an integral member of the district's administrative team, responsible for a diverse, complex, and challenging array of duties and deadlines. Most can recall their first days on the job as intimidating, overwhelming and scary. Through perseverance and determination, along with the network of support services available through their membership in MASBO, many have been able to say they rose above the fear, became experts in their field, made a lot of friends and had fun along the way. In honor of Clerk/Business Managers who have passed before us, the MASBO board created the *Memorial Scholarship for New Clerks*.

Criteria for Eligibility

A person eligible to receive the New Clerk Scholarship must meet the following criteria:

- Must be an active MASBO member, as defined in the association's by-laws; and
- Must be employed as the Clerk, Clerk/Business Manager, Business Manager, Director of Business Services, or other similar title in a Montana public school district; and
- Must have no more than 3 years' experience in the position in a Montana public school district.

Presentation of Award

At the Closing Session of the annual summer conference, the names of all eligible New Clerks were entered into a drawing (did not need to be present to win).

Scholarship Award

The scholarship award may be used as follows:

- Free registration to any New Clerk Academy workshop offered in FY2019, or
- Free registration to any two (2) of the following workshops;
 - a. Elections
 - b. Technology
 - c. Budget for New Clerks
 - d. Spring Regionals

The scholarship must be used by the recipient; it is not transferrable. If it is not used by June 30, 2019, the award is forfeited.

Rachelle Pearson (Greenfield) won the Memorial Scholarship for New Clerks for FY2019. Congratulations!



MONTANA CONFERENCE OF EDUCATION LEADERSHIP

The 2018 MCEL Conference, "Be an Agent of Change" will be held **October 17 – 19** at the Hilton Garden Inn in Missoula.

Registration for video and in person attendance is now open. Go to www.mcel.org to sign up and also see the conference schedule at a glance and hotel reservation information.



P-CARD NEWS-----

2018 REBATE HITS ALL TIME HIGH OF \$270,801.07

MASBO received \$270,801.07 for our prorated share of Illinois ASBO's Procurement Card Program rebate for purchases made between April 2017 and March 2018. This is based on almost \$19.8 million in total P-card purchases made by Montana school districts, an increase of over \$1 million in total purchases made in the previous program year. After much consideration and discussion, the MASBO Board of Directors have changed the distribution of the rebate to better reflect the way Illinois ASBO computes the amount generated by each participating district (total purchases, grace period for payment and spend per card). As a result, the 130 participants in the program will receive between 1.08% - 1.38% on their district's total purchases. Click here to see the distribution list posted on the MASBO website.

The following participants had the *Top 5 Highest Total Purchases*:

- Havre Schools (\$1,362,887)
- Sidney Schools (\$1,299,936)
- Polson Schools (\$1,002,481)
- Harlem Schools (\$691,271)
- Florence-Carlton (\$619,831)

The following participants had the *Top 5 Highest Purchases per ANB* (based on FY2017 Budget Report)

- Plevna (\$2,401.28)
- North Star (\$2,018.13)
- Highwood (\$1,730.21)
- Ekalaka (\$1,593.31)
- Sunburst (\$1,547.84)

Plevna Schools won a free registration to the 2019 MASBO Summer Conference. Congratulations!

UPCOMING TRAINING OPPORTUNITIES

2018 Summer E-grants Training with OPI

The Summer E-grants Tour Schedule is as follows:

July 9 and August 9
 July 10
 Helena High School Computer Lab
 Belgrade Middle School Computer Lab

July 17 Glendive: Dawson High School Computer Lab
 July 24 Kalispell: Glacier High School Computer Lab
 July 25 Missoula: Big Sky High School Computer Lab

For more information, please contact Jack O'Connor at 406-444-3083 or joconnor2@mt.gov.

ASBO 2018 Annual Meeting & Expo

The ASBO Annual Meeting & Expo will be held *September 21-24* in Kissimmee, FL. This conference offers a lot of valuable workshops and seminars on school business topics and best practices, top notch keynote speakers, and opportunities to meet and network with school business officials nationwide. Click *here* to read more, register and make hotel reservations.



Montana is well represented at the ASBO Annual Meeting.
Join us in Kissimmee!

MASBO ENDORSES THESE PROGRAMS



Healthcare Reform Section 125 Services Health Savings Account Services Jacob Bautista, Office Manager 877-589-2544

<u>jacob.bautista@americanfidelity.com</u> http://www.americanfidelity.com/home.aspx



Montana Schools Group Insurance Authority Workers Compensation Insurance **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

<u>aholmlund@ms-sf.org</u>

http://mustbenefits.org/



Montana Schools Unemployment Insurance Program **Theresia LeSueur,** Director 406-457-4407

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



Montana Schools Property & Liability Insurance Plan **Dave Pillatzke,** Program Manager 406-457-4531

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

JULY 1				
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		
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)		
JULY 10				
Traffic Education TE06 Year-End Reports due to OPI.	Submit your TE06 Year-End Report before July 10 for an estimated reimbursement of at least \$90 for each student who completed a traffic education course at your school between July 1, 2017 and June 30, 2018. The TE06 Year-End Report includes your program and budget information and can be submitted when all your courses have completed for the current school year. Verify that all student lists for the current school year have been submitted and recorded by the OPI's Traffic Education office by logging into the Traffic Education Data & Reporting System (TEDRS) and clicking on Reports/Student Count Report. You can also complete and submit your TE06 via TEDRS. The actual reimbursement amount will be determined when OPI receives all TE04 Student Lists and TE06 Year-End Reports. The number of students is divided by the percentage of driver license fees allocated for reimbursement to schools. Reimbursements are issued in mid-August. For more information, contact Fran Penner-Ray, 406-444-4396.	Form TE06 OPI Traffic Education Forms and Reports		

IMPORTANT DATES & DEADLINES - JULY 2018					
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			
JULY 23					
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			
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, 2018	Last day to liquidate funds for grants that ended June 30, 2018: ABLE Extension ABLE, El Civics State ABLE ACT Plus Writing (Gear-Up) Carl Perkins and Technical Education Title IV, 21st Century Community Learning Centers	OPI State and Federal Grants Handbook OPI Email 5/21/2018 Grant Deadlines			
1st Semester Bus Inspections must be completed	Use form TR-13 Bus Inspection for 1st semester bus inspections. The Highway Patrol must inspect the buses at least 30 days prior to the beginning of the school term.	MCA, 20-10-101(4)(a)(i) Regulations & Guidelines for Pupil Transportation Reporting (see page 4)			

HANDY YEAR-END RESOURCES

OPI Spreadsheets and Other Resources

- ✓ Reconciling Cash to the County Treasurer
- ✓ Fund 15 Recap Worksheet
- ✓ <u>Student Activity Fund Recap Spreadsheet</u>
- ✓ Compensated Absences Spreadsheet
- ✓ Trustees Financial Summary (TFS) Checklist
- ✓ School Accounting Manual

KEEP CURRENT WITH OPI

Each month, the Office of Public
Instruction posts the OPI Summary
of Activities which gives lots of
information about upcoming
deadlines, training opportunities and
guidance. Click here to see this
month's issue.

50 YEARS of MASBO

Summer Conference & New Clerk Academy Thank You to Our Sponsors & Exhibitors

Montana Schools Unemployment Insurance Program (MTSUIP)

Montana Cooperative Services (MCS)

Lifetouch National School Studios

Montana Schools Group Insurance Authority (MSGIA/WCRRP)

Frontline Education

DA Davidson & Co. Foxie Lady Computers

Montana Schools Property & Liability Insurance Plan (MSPLIP)

Felt, Martin, Frazier & Weldon, P.C.

Black Mountain Software, Inc.

Horace Mann Companies

Montana Unified School Trust (MUST)

Aflac

American Fidelity Assurance Company Bruco, Inc.

Fatbeam

Fellon Insurance Services
Infinite Campus
Joint Powers Trust
Klimas Financial Services, Inc.

National IPA

Natural Essentials

New Hope Technology Foundation
Montana Public Employee Retirement Administration (MPERA)

MT Recruitment Project

Pine Cove Consulting

Stifel Nicolaus

SW Montana School Services

TimeClock Plus

Tyler Technologies

Valic

Quincy's Corner

MASBO Service Pins Summer Conference June 14, 2018				
10 YEARS				
Name	School District			
Melissa Bartlet	Reed Point			
Nicole Buerkle	Plevna			
JoyAnn Breakall	Twin Bridges			
Carmen Eiselein	Roundup			
Jen Mettler	Baker			
Charlotte Mortigeau	Dixon			
Laurie Noonkester	Lockwood			
Terri Reinhardt	Broadview			
Jennifer Ryan	Arlee			
Mary Lou Tweet	Choteau County			
Carol Williams	Lincoln			
	20 YEARS			
Name	School District			
Kelly Doornek	Glasgow			
Ramona Glaus	Beaverhead County HS			
Joni Kremer	Central MT Learning Resource Center			
Sharon Leach	Kila			
Nica Merala	Office of Public Instruction			
Debbie Orelup	Independent			
Doreen Young	Harrison			
30 YEARS				
Name	School District			
Daralyn Shambo	Hays Lodge Pole			



CONGRATULATIONS RETIREES!!

Rhonda Opp – Medicine Lake Wanda Kirn – Poplar Rosie Mitchell – Judith Gap Kim Fadrhonc – Great Falls Sara Kerr – Absarokee Teresa Cornell – Harlem



CERTFICATION PROGRAM RECIPIENTS

Ginny Holland, Plains – Standard Certificate renewal
Toby Wetsch, Drummond – Professional Level I
Andrew Kruzich, Evergreen – Professional Level II
Mary Lundy, Valier – Professional Level II
Lacy Porrovecchio, Bigfork – Professional Level II
Shari Hurst, Plentywood – MCSBO renewal
Melissa Bartelt, Reed Point – MCSBO
Jane Knudsen, Malta – MCSBO
Maryetta Engle, Big Sandy – MCSBO
Rebekah Rhoades, Lewistown – MCSBO
Rita Huck, Huntley Project – MCSBO
Deb Anderson, Polson - MCSBO

MASBO EXHIBITOR MEMBERS				
Aflac Rob Cook r cook@us.aflac.com	American Fidelity Assurance Co. Angie Newman angie.newman@americanfidelity.com	Anderson, Zurmuehlen & Co. Stefeni Freese, CPA sfreese@azworld.com		
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Infinite Campus Stephanie Sondrol Stephanie.sondrol@infinitecampus.com	Insurance Management Services of MT John R Boyer john@imsvest.com	Joint Powers Trust Cyndy Maxwell cyndy@jointpowerstrust.com		
Klimas Financial Services, Inc. Charles Klimas cklimas@gwnsecurities.com	Montana Public Employees Retirement Administration Jenny Weigand jweigand@mt.gov	MSGIA-WCRRP Shawn Bubb sbubb@mstba.org		
Montana Schools Property & Liability Insurance Plan (MSPLIP) Dave Pillatzke dpillatzke@paynewest.com	Montana Schools Unemployment Insurance Program (MTSUIP) Theresia LeSueur tlesueur@mtsba.com	Montana Unified School Trust Andy Holmlund aholmlund@ms-sf.org		
National IPA and TCPN Shelley Andrews shelley.andrews@nationalipa.org	New Hope Technology Foundation John Hughes, Senior Consultant john@newhopetech.org	Pine Cove Consulting Brandan Bassett bbassett@pinecc.com		
Rudd & Company, PLLC Julie Kostelecky, CPA, CVA jkostelecky@ruddco.com	School Specialty Scott Wilkey scott.wilkey@schoolspeciality.com	Schoolhouse IT Jeffrey Patterson jeffp@schoolhouseit.com		
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TimeClock Plus James Baker sales@timeclockplus.com	Tyler Technologies Carrie Hughes carrie.hughes@tylertech.com	VALIC Michael Hart michael.hart@valic.com		
Wipfli LLP Kim Dare, CPA kdare@wipfli.com	Todd Watkins Consulting Services Todd Watkins Toddwatkinsconsulting101@gmail.com	Felt, Martin, Frazier & Weldon, PC Jeffrey Weldon JWeldon@feltmartinlaw.com		

Veg out the Healthy Way



Eat healthy the veggie way

You've always heard that you should eat your vegetables, and with good reason. These foods are low in calories and fat and offer tons of healthful nutrients.

Want to know some ways to get more veggies? Here's what you can do:

- Keep cut up veggies on hand for a snack.
- Choose low- or no-salt canned veggies.
- Try low-fat dip with carrots, broccoli or cauliflower for a tasty treat.
- Get children involved with shopping for and cooking food.
- Add shredded, chopped or pureed veggies in soups, stews, casseroles, sauces and other dishes.
- Buy vegetables that are easy to cook, along with prepackaged or precut ones.

How many vegetables are needed daily?

The amount of vegetables you need to eat depends on your age, gender and level of physical activity. Recommended total daily amounts are shown in the chart.

Daily recommendation*		
Children	2 - 3 years old 4 - 8 years old	1 cup 1 ½ cups
Girls	9 - 13 years old 14 - 18 years old	2 cups 2 ½ cups
Boys	9 - 13 years old 14 - 18 years old	2 ½ cups 3 cups
Women	19 - 30 years old 31 - 50 years old 51+ years old	2 ½ cups 2 ½ cups 2 cups
Men	19 - 30 years old 31 - 50 years old 51+ years old	3 cups 3 cups 2 ½ cups

^{*}These amounts are appropriate for individuals who get less than 30 minutes per day of moderate physical activity, beyond normal daily activities. Those who are more physically active may be able to consume more while staying within calorie needs.

bcbsmt.com

725272.051

Source: United States Department of Agriculture