

MONTANA ASSOCIATION OF SCHOOL BUSINESS OFFICIALS



Empower School Business Leaders Through Education
JUNE 2019

JACKI YOUNG NAMED 2019 OUTSTANDING SCHOOL BUSINESS OFFICIAL

Jacki Young has been a business official and MASBO member for 19 years and an ASBO International member for 9 years. She has worked at Fairview School District for 23 years; 4 years as Assistant Clerk and 19 years in her current position as District Clerk/Business Manager. She's been a mentor (officially and unofficially) to many new clerks across the state. She was a lead trainer for the MASBO New Clerk Academy, which she planned and co-presented with Mike Arnold from 2012 – 2018 and she has also shared her knowledge and expertise at MASBO Summer Conference and Veteran Clerk workshops. Jacki served on the MASBO Board of Directors from 2008 – 2015, first as Region 3 Director, then Vice-President, President and Past-President. During her tenure on MASBO's executive board, Jacki's vision, judgment and behind-the-scenes work were instrumental in helping the organization successfully navigate through significant changes in staff, structure and governance.



Jacki's work extends beyond that of a typical school business official, including construction foreman on multi-million dollar building projects, landlord for the district's 16 housing units, tour guide for class reunions each year and school historian. She obtained a Breakfast After the Bell Grant which expanded Fairview's breakfast program, resulting in a 60% increase in breakfast attendance. She routinely provides information about the school's enrollment and finances to the board of trustees, church groups, city council and chamber of commerce. She believes the community groups appreciate the information and in turn, are more supportive of the school. Her service to students includes assisting with scholarship, FAFSA and college applications, job shadowing for students interested in accounting/office work, debate judge for speech and drama, music booster club treasurer since 2000 and state music festival chaperone. She has participated on various state level committees and task forces representing the schools in her region and has testified numerous times at the state legislative session as an advocate for Montana's students.

An exemplary member of the Fairview community, Jacki has served on several committees: Foundation for Community Care (9 years), Richland County Crime Stoppers Board of Directors (since 2013), Fairview Senior Citizens Housing Board Secretary (since 1999), Sunrise Women's Center (4 years) and 20 years on the Fairview Festival Committee which brings 3,000+ people annually to the community for class reunions and community events.

Here are some noteworthy comments from Jacki's peers:

- ★ *"Jacki has the heart of a teacher and a true passion for helping others succeed."*
- ★ *"She not only embodies a highly competent business manager, she is a true friend and helpful colleague to many."*
- ★ *"Jacki works very hard and is passionate about education, the students and the Fairview community."*
- ★ *"Jacki knows her job inside and out and has always taken pride in not only doing her job right, but excelling in it."*

CONGRATULATIONS, JACKI!

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 2019 award!

Patti Drake, Whitehall

Pat McHugh, Missoula

Jacki Young, Fairview

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 Flath**

Region 1 Director **Noreen Anderson**, Hellgate K-8 School
Region 2 Director **Belinda Klick**, Sun River Valley Schools
Region 3 Director **Cheri Nygard**, Wolf Point Schools
Region 4 Director **Kevin Patrick**, Anaconda Schools
Region 5 Director **Rita Huck**, Huntley Project Schools
Region 6 Director **Jen Mettler**, Baker Schools

MASBO Staff

Denise Williams, Executive Director
406-461-3659

Marie Roach, Administrative Assistant
406-461-8804

A Message from Your MASBO President Cindy Foley (West Valley Schools)

Dear MASBO Friends,

This note is to say thank you! There is no way any of us can do what we do each day by ourselves and to have the support of other school business officials is the only way to get through it. This organization has always looked out for each other through mentorship, wonderful trainings and outreach, to caring about each other outside of "the job". The role of the MASBO Board is to listen to its members, enhance the role of the school business official and make our organization the very best it can be. I honestly believe this, and in fact I know that the Board you currently have is doing that and expanding on what previous boards have already put in place.



The opportunity I have had to serve as a MASBO Officer has been so very rewarding and a privilege, thanks to all of you. From the vote of confidence I received from Region 1 to serve as the Director, to then the vote of the greater MASBO membership to serve as your VP, President, and now moving into the role as Past President, has been very humbling and such an honor! Thank you so very much!!

Keep up the great work you do every day and don't ever forget how important you are to the students, the staff, and the communities you serve!

I look forward to seeing you in the year to come and continuing to work hard in serving as your Past President. Have a great summer and try to get some down time for yourself!

Love,
Cindy

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

If you haven't done so already, please complete the 2019 Summer Conference & New Clerk Academy Evaluations, including evaluations for individual sessions. Click [here](#) to get started!

2019 SUMMER CONFERENCE FOLLOW-UP

Thanks to all who were able to take time away from the office during the week of June 10 - 14 to join us in Great Falls for the **Reach for the Stars** summer conference and New Clerk Academy. There were 208 attendees, 25 exhibitors and 68 presenters providing sessions on 52 different topics. Much learning, networking and FUN was had by all. For the first time, we had a **mobile event app** to help you keep track of your training schedule on your smart phone and a **Learning Notebook** to help attendees take notes during their training sessions. We also celebrated MASBO's mentor program by hosting a Mentor-Mentee Breakfast. Here are some other highlights of the conference:

- **TRAINING SESSIONS**

The Heritage Inn had enough meeting rooms to allow us to offer conference attendees a variety of training topic options. Several sessions were led by MASBO board members and members rising to the challenge to give a presentation for the first time. New this year was a 2-hour class on preparing the TOE/Compensation Expenditure Report with a focus on use of your software system to get it done, student record requests, technology best practices and two sessions on the complexities of the Building Reserve Fund. Back by popular demand were roundtable discussions, essential oils, and useful excel spreadsheets you can use at work. Friday's important topics were a legal update from MTSBA's Debra Silk and a legislative update from OPI's Kara Flath. MASBO's sponsors gave presentations on workers comp, property and liability issues, 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 9 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 10 retirements and 9 certification program achievements (see list on page 8 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. Jacki Young was named the 2019 Outstanding Business Official.

- **SUNSHINE FUND**

Thank you to everyone who brought an item for the silent auction and/or donated cash. Your efforts and generosity brought in a total of **\$2,880.00**, which we promptly forwarded to **Judi Ward** of Harrison Schools. Also, thanks to **Bunky Wirtz** for organizing and handling this event each year.

IN CASE YOU MISSED IT

Click [here](#) 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.

A Big Thank You to everyone who donated to the Sunshine Fund. There were some really great things for people to bid on. Your generosity is much appreciated and truly heartfelt. The money will really help for all the medical bills. Insurance doesn't cover everything.

~ Judi Ward, Harrison Schools



P-CARD NEWS-----

2019 REBATE GROWS TO **\$316,219.00**

MASBO received \$316,219.00 for our prorated share of Illinois ASBO's Procurement Card Program rebate for purchases made between April 2018 and March 2019. This is based on almost \$22.6 million in total P-card purchases made by Montana school districts, an increase of just under \$3 million in total purchases made in the previous program year. The MASBO Board of Directors will continue to distribute the rebate to 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 135 participants in the program will receive between 1.12% - 1.46% 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**:

- Sidney Schools (\$1,771,520)
- Havre Schools (\$1,326,575)
- Polson Schools (\$ 1,027,585)
- Anaconda Schools (\$812,473)
- Harlem (\$804,362)

The following participants had the **Top 5 Highest Purchases per ANB** (based on FY2019 Budget Reports)

- Divide (\$2,781.00)
- North Star (\$2,096.05)
- Highwood (\$2,050.93)
- Plevna (\$1,943.85)
- Ekalaka (\$1,688.45)

North Star Schools won a free registration to the 2020 MASBO Summer Conference. Congratulations!

UPCOMING TRAINING OPPORTUNITIES

SUMMER E-GRANTS TRAINING

Mark your calendars for E-Grants training in July at several locations around the state:

- July 9 **Helena** High School
- July 11 **Belgrade** Middle School
- July 16 Dawson High School in **Glendive**
- July 30 Glacier High School in **Kalispell**
- July 31 Sentinel High School in **Missoula**
- August 6 **Helena** High School

For more information see the OPI's
Official Email posted May 13: Click [HERE](#)

MASBO SCHOOL FACILITIES PLANNING & FINANCING WORKSHOP

Save the date! Join us **September 16 – 17** in **Helena** for a 1½ day workshop designed to provide guidance and ideas on how to approach school facilities planning and financing. Registration and agenda are coming soon.

MONTANA CONFERENCE OF EDUCATION LEADERSHIP

The 2019 MCEL Conference, **"Every Child. Every School."** will be held **October 16 – 18** at the **Double Tree in Billings**. Registration for video and in person attendance is available at mcel.org. Check out the conference schedule at a glance and hotel reservation information, too.

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 tlsueur@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>

IMPORTANT DATES & DEADLINES - JULY 2019

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
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.	<p>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, 2018 and June 30, 2019. 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.</p> <p>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.</p> <p>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.</p> <p>For more information, contact Fran Penner-Ray, 406-444-4396.</p>	Form TE06 OPI Traffic Education Forms and Reports
---	--	--

IMPORTANT DATES & DEADLINES - JULY 2019

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 22		
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, 2019	Last day to liquidate funds for grants that ended June 30, 2019: <ul style="list-style-type: none"> • Adult Basic and Literacy Education • Carl Perkins and Technical Education • Title IV, Part B, 21st Century Community Learning Centers • Gifted and Talented • Indian Education for All • In-State Facilities: Significant Needs Schools • Pre-School Development Grant • State Adult Education 	OPI State and Federal Grants Handbook OPI Email 5/14/2019 Grant Deadlines
1st Semester Bus Inspections must be completed <u>Note: could be earlier than July 31</u>	Use form TR-13 Bus Inspection for 1st semester bus inspections. The Highway Patrol must inspect the buses <i>at least 30 days prior to the beginning of the school term.</i>	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](#)
- ✓ [Student Activity Fund Recap Spreadsheet](#)
- ✓ [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.

**MASBO Service Pins
Summer Conference June 13, 2019**

10 YEARS

Name	School District
<i>Jamie Goss</i>	<i>Grass Range</i>
<i>Denise Grant</i>	<i>Fairfield</i>
<i>Carrie Fisher</i>	<i>Gallatin Gateway</i>
<i>Pat Hill</i>	<i>Hamilton</i>
<i>Cathy Maloney</i>	<i>Silver Bow County</i>
<i>Britton Mann</i>	<i>Boulder Elementary</i>
<i>Laurie Noonkester</i>	<i>Lockwood</i>
<i>Kris Ortmeier</i>	<i>Monforton</i>

20 YEARS

Name	School District
<i>Sue Becker</i>	<i>Lamotte</i>
<i>Vanessa Bargfrede</i>	<i>Corvallis</i>
<i>Cathy Kalmack</i>	<i>Terry</i>
<i>Tanya Roberts</i>	<i>Anderson</i>

30 YEARS

Name	School District
<i>Jeanne Carroll</i>	<i>Canyon Creek</i>
<i>Stephen Hamel</i>	<i>Fort Benton</i>
<i>Donnie McVee</i>	<i>Laurel</i>
<i>Connie Miller</i>	<i>Opheim</i>
<i>Della VanHorn</i>	<i>Circle and Vida</i>

It's Monday again...



Oh wait, I'm retired!!!



**CONGRATULATIONS
RETIREES!!**

Vivian Guthrie – Fishtail and Nye
Arlene Hartman – Highwood
Peggy Harrell – McCormick
Patty Boyle – Cascade County
Mary Meyer – Trout Creek
Danelle Reisch – Whitefish
Charlotte Morigeau – Dixon
Rae Mitchell – Marion
Patti Wilson – Melstone
Joyanne Breakall – Twin Bridges



CERTIFICATION PROGRAM RECIPIENTS

Kim Aarstad, East Helena – Standard Certificate
 Jen Mettler, Baker – Professional Level I & II
 Becky Larsen, Sheridan – Professional Level II
 Colleen Drury, Scobey – Professional Level III
 Ginger Martello, Ennis – Professional Level III
 Colleen Drury, Scobey MCSBO
 Ginger Martello, Ennis – MCSBO
 Pamela Clary, Polson – MCSBO renewal
 Cindy Foley, West Valley – MCSBO renewal
 Betty Sweet, Bridger – MCSBO renewal

REACH FOR THE STARS
MASBO Summer Conference & New Clerk Academy
Thank You Summer Conference Sponsors & Exhibitors

Montana Schools Unemployment Insurance Program (MTSUIP)

D.A. Davidson & Co.

Lifetouch National School Studios

Montana Cooperative Services (MCS)

Tyler Technology

Workers Compensation Risk Retention Program (MSGIA/WCRRP)

Horace Mann

Aflac

Black Mountain Software

C& C School Accounting

Montana Schools Property & Liability Insurance Plan (Payne West/MSPLIP)

Infinite Campus

Montana Unified School Trust (MUST)

Fisher's Technology

American Fidelity

Bruco

Empower Retirement

Fatbeam

Joint Powers Trust

Klimas Financial Services

Montana Public Employee Retirement Administration (MPERA)

MT Schools Recruitment Project

Natural Essentials

SW Montana School Services

Teachers on Call

Valic

MASBO EXHIBITOR MEMBERS

Aflac Rob Cook R_cook@us.aflac.com	American Fidelity Assurance Company Jacob Bautista, Office Manager jacob.Bautista@americanfidelity.com	Anderson, Zurmuehlen & Co. Stefeni Freese, CPA sfreese@azworld.com
Edie Barnard Edie.barnard56@gmail.com	Black Mountain Software Teresa Van Buren teresav@blackmountainsoftware.com	Bruco, Inc. Adam Uselman, V.P.-C.O.O. adambruco@gmail.com
C & C School Accounting David Bardwell Help@CandCSchoolAccounting.com	D.A. Davidson & Co. Bridget Ekstrom Bekstrom@dadco.com	Fellon Insurance Services Dale Fellon fellonins@msn.com
Frontline Technologies Elise Ozarowski eoazarowski@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	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 Unemployment Insurance Program (MTSUIP) Theresia LeSueur tlesueur@mtsba.com
Montana Unified School Trust (MUST) Andy Holmlund aholmlund@ms-sf.org	New Hope Technology Foundation John Hughes john@newhopetech.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	Schoolhouse IT Jeffrey Patterson jeffp@schoolhouseit.com
Southwest MT School Services Thomas Franta tfranta@swmss.coop	Stifel Nicolaus Bryan Stelmack yroybal@stifel.com	Tandy Enterprises Donna M. Tandy donnatandy77@gmail.com
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	VALIC Michael Hart michael.hart@valic.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	

HELPING YOU HAVE A **HEALTHY** PREGNANCY



BALANCE YOUR BUMP: PRENATAL LOWER BODY WORKOUT

- Toe Raises x 20
- Plie Squats x 20
- 360 degree lunges x 5
(front, side, back, and repeat on both legs)
- Deadlifts x 10
- Squats x 20
- Alternating Lunges x 15

Do 15 reps of each move and
repeat cycle 3-4 times!

BENEFITS OF EXERCISE DURING PREGNANCY

Baby on board or not, your body benefits from exercise in a variety of ways beyond weight control: improved heart health, a mental boost, increased energy, killer confidence, better sleep and the list goes on and on.

- **Limits the risk of gestational diabetes—**
pregnancy workouts of at least 30 minutes, three times a week—especially in the first trimester
- **Helps you achieve your labor goals—**
If a natural birth is what you seek, exercise during pregnancy can reduce the need for cesarean deliveries
- **Keeps baby weight in check—**
Pregnancy workouts help establish a balance between cravings of ice cream and pickles with having a healthy pregnancy
- **Increases your comfort level—**
By performing pregnancy workouts, even as light as walking, you can increase blood circulation, and thus help flush away fluids



mustbenefits.org | 406.457.4400 |  @MUSTbenefits