

MONTANA ASSOCIATION OF SCHOOL BUSINESS OFFICIALS



Empowering School Business Leaders Through Education
JUNE 2021

REBEKAH RHOADES NAMED 2021 OUTSTANDING SCHOOL BUSINESS OFFICIAL

Rebekah Rhoades has a Bachelor of Science degree in Business, earned from Montana State University, and she has taken enough classes at UM-Western to provisionally teach Business Education. She has been a District Clerk/Business Manager and a member of MASBO since 2012. And in those 9 years, she has been quite busy at her school, in her community and in MASBO!



In addition to holding regular meetings to keep classified administrative staff, secretaries and business office staff informed about the school's budget and finances, she volunteers for various school activities, including reading Green Eggs 'n Ham to the kindergarteners and coaching track. She has taught Excel and administrative assistant skills in her district's Adult Education program.

In 2013 Rebekah completed the Leadership Central Montana training program and speaks regularly about school funding and elections to the local Kiwanis and Rotary clubs. She has worked with Snowy Mountain Development to explore ways to increase housing opportunities and childcare in her community. She is an active member of Rotary and Daughters of the American Revolution. In 2019 she was nominated by a member of her community and received the "Rising Central Montana Star" award.

After 4 years of attending just about every training offered by MASBO, MTSBA and other organizations, she started giving presentations at summer conference, beginning with Excel skills at the 2016, 2017 and 2019 conferences and at the 2016 Technology workshop. She also shared her district's budget information at the 2016 and 2017 Budget workshops and most recently led two presentations at her region's spring workshop. Rebekah serves as mentor to three new clerks and is a Montana Certified School Business Official. In 2019 she was elected to serve as Region 5 Director.

In the letter of recommendation signed by all seven of Lewistown's board of trustees, they describe Rebekah as a bridge builder who humbly and quietly leads the district through financial difficulties and staffing concerns and in doing so, always remembers the human element. The level of trust and respect is such that they say, "When she talks, we all listen".

CONGRATULATIONS, REBEKAH!

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 2021 award!

Sue Becker, LaMotte

Shanna Flores, Havre

Rebekah Rhoades, Lewistown

MASBO Board of Directors

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

MASBO Staff

Denise Williams
Executive Director
406-461-3659

Marie Roach
Association Services Coordinator
406-461-8804

Steve Hamel
Interim Services/Trainer
406-431-0124

A Message from Your MASBO President **Lorie Carey (Jefferson County High School)**

Greetings fellow MASBO members!!

Those of you who attended the summer conference in person – did it feel like you were a bird set free? I did. Denise, Marie, and Steve did a great job planning and executing it for sure.



Denise asked me, as the out-going President, to write a few words to you all.

I have so enjoyed serving you in that capacity these past two years, strange as they have been. I would also like to encourage all of you to think about becoming a bit more involved in our organization. There are such a wide variety of ways to participate that there HAS to be something in which you could be involved. For new clerks, especially those who are brand new to school finance, attending training helps you gain knowledge and sets up connections with other clerks. Clerks with more experience could serve on a committee, run for regional director, mentor a first-timer, present at a workshop or summer conference. Often by serving, one also gains additional knowledge themselves. If you are interested, don't wait for someone to ask you - let our office know you would like to volunteer.

Thank you for serving the schools and students of Montana. You are the glue that holds everything together. (Don't be super glue though, just a nice flexible adhesive is best!)

Wishing you a seamless transition from 20/21 to 21/22,
Lorie J. Carey

UPDATE YOUR INFORMATION

Start out the new fiscal year on the right foot by updating your information in the following databases:

- [MASBO](#): Log in, click on the down arrow box next to your picture, then click on Profile.
- [MTSBA](#): [Click here](#) to download instructions on how to make updates to your district's information.
- [OPI](#): Click on the blue box, Directory of Schools, and log in. Click [here](#) for Instructions.

2021 SUMMER CONFERENCE FOLLOW-UP

Thanks to all who were able to take time away from the office during the week of June 14 - 18 to join us in Billings for a **Family Reunion** summer conference and New Clerk Academy. There were 184 attendees, 14 exhibitors and 62 presenters providing sessions on 51 different topics both in-person and virtually. Much learning, networking and FUN was had by all. We hope our **mobile event app** helped you keep track of your training schedule on your smart phone and the **Learning Notebook** helped you keep track of your notes during the training sessions. We also celebrated MASBO's mentor program by hosting a Mentor-Mentee Breakfast and **Belinda Klick** (Sun River Valley Schools) was elected to serve as MASBO Vice-President beginning July 1, 2021. Here are some other highlights of the conference:

- **TRAINING SESSIONS**

The Billings Hotel & Convention Center was a great place to get together again. Several sessions were led by MASBO board members and members rising to the challenge to give a presentation or facilitate a roundtable discussion for the first time. New this year was a 2-hour session on exploring your personality, legislative updates from three perspectives and important ESSER funding webinars. Back by popular demand were roundtable discussions, essential oils, and financing school facilities projects. Friday's important topics were a legal update from MTSBA's Debra Silk and roundtables by school class size, each led by MASBO board members. MASBO's sponsors gave presentations on workers comp, property and liability issues, healthcare reimbursement accounts, 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 6 retirements and 3 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. Rebekah Rhoades was named the 2021 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 **\$3,325.00**, which we promptly forwarded to **Maryetta Engle** of Big Sandy Schools and **Dixie Mitchell** of Broadus Schools. Thank you, **Bunky Wirtz** for overseeing this event each year.



SUMMER CONFERENCE EVALUATION

If you haven't done so already, there is still time to submit an evaluation of the summer conference. If you didn't give feedback on individual sessions in the mobile event app, you can do so in the comments portion of the evaluation form. Click [here](#) to get started.

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.

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>



P-CARD NEWS-----

2021 REBATE GROWS TO **\$384,921.18**

MASBO received \$384,921.18 for our prorated share of Illinois ASBO's Procurement Card Program rebate for purchases made between April 2020 and March 2021. This is based on over \$27.2 million in total P-card purchases made by Montana school districts and special education cooperatives. 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, average rate of pay, etc.). As a result, 152 participants in the program will receive between 1.06% - 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**:

- Havre Schools (\$1,592,450)
- Sidney Schools (\$1,516,427)
- Anaconda Schools (\$1,213,032)
- Helena Schools (\$1,188,247)
- Polson Schools (\$1,034,403)

The following participants had the **Top 5 Highest Purchases per ANB** (based on FY2021 Budget Reports)

- Nye School (\$3,619.52)
- Melrose Schools (\$2,653.31)
- Yellowstone Academy (\$2,164.74)
- Divide School (\$2,058.62)
- North Star Schools (\$1,688.45)

Yellowstone-West Carbon Special Education Cooperative had the highest total purchases (\$86,222) of the special education cooperatives group.

Sidney Schools and **Polson Schools** won a free registration to the 2022 MASBO Summer Conference. Congratulations!

SUMMER E-GRANTS TRAINING

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

- July 12 **Laurel** High School
- July 13 **Glendive** High School
- July 13 East **Evergreen** Elementary
- July 14 **Glasgow** Middle School
- July 14 Target Range in **Missoula**
- July 15 Fergus High School in **Lewistown**
- July 15 **Manhattan** PS

For more information see the OPI's
Official Email posted June 29: Click [HERE](#)

Attendees must bring a Wi-Fi enabled laptop. OPI will not be using district computer labs for the trainings. As a backup, a district may want to bring a hotspot if it has one.

All sessions are limited to 30 people. Districts are limited to two staff members and must RSVP by emailing SHarlow@mt.gov. Reservations will be on a first come, first served basis. If you must cancel, please notify the OPI as soon as possible so districts on the wait list can be contacted. For further questions, please email Sheri Harlow.

IMPORTANT DATES & DEADLINES - JULY 2021

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)

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, 2020 and June 30, 2021 (with some exceptions for programs still catching up due to the COVID-19 pandemic and are completing their courses in July).</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 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 Patti Borneman or call (406) 444-4432.</p>	Form TE06 OPI Traffic Education Forms and Reports OPI Official Email June 4
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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)
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IMPORTANT DATES & DEADLINES - JULY 2021

JULY 27

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)
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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
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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"> • ALE Extension • ALE, EL Civics • State ALE • 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 	OPI State and Federal Grants Handbook

At least 30 days prior to first semester of the new school year

1st Semester Bus Inspections must be completed	Use form TR-13 Bus Inspection for inspections of yellow school buses. Use form TR-13A Bus Inspection for inspections of Type E buses. The Highway Patrol must inspect (an re-inspect, if needed) the buses prior to the beginning of first semester.	MCA, 20-10-101(4)(a)(i) Regulations & Guidelines for Pupil Transportation Reporting (see page 4)
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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](#)
- ✓ [Chart of Accounts](#)
- ✓ [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 17, 2021**

10 YEARS

Name	School District
<i>Patty Mellinger</i>	<i>Choteau</i>
<i>Karmen Tesarek</i>	<i>Central MT Learning Resource Center</i>
<i>Lisa Poe</i>	<i>Darby</i>
<i>Ande Kortum</i>	<i>Ekalaka</i>
<i>Shelley Keller</i>	<i>Lustre</i>
<i>Jessica Bird</i>	<i>Missoula County</i>
<i>Debbie Casey</i>	<i>OPI</i>
<i>Carolyn Bilden</i>	<i>Roundup</i>
<i>Colleen Drury</i>	<i>Scobey</i>
<i>Mary Lundy</i>	<i>Valier</i>
<i>Serina Nelson</i>	<i>West Valley</i>
<i>Diane Downey</i>	<i>Yaak</i>

20 YEARS

Name	School District
<i>Kim Aarstad</i>	<i>East Helena</i>
<i>Rita Huck</i>	<i>Huntley Project</i>
<i>Cindy Barta</i>	<i>Moore</i>
<i>Sherri Lower</i>	<i>Willow Creek</i>

30 YEARS

Name	School District
<i>Denise Heimburger</i>	<i>Blue Creek</i>



**CERTIFICATION PROGRAM
RECIPIENTS**

Heather Mumby, Cayuse Prairie
Professional Level III

Jeri Anton, Billings
Professional Level III & MCSBO

Carmen Jackson, Hot Springs
MCSBO Renewal



**CONGRATULATIONS
RETIREES!!**

Karen Paugh – Denton
Sherri Bergstrom – Hobson
Diana Miller – Savage
Pam Watson – Townsend
Jacki Young – Fairview
Judi Ward – Harrison

FAMILY REUNION
MASBO Summer Conference & New Clerk Academy
Thank You Sponsors & Exhibitors

Montana Schools Unemployment Insurance Program (MTSUIP)

DA Davidson & Company

Dorsey & Whitney LLP

Lifetouch National School Studios

Montana Schools Group Insurance Authority (MSGIA/WCRRP)

Infinite Campus

Black Mountain Software

C& C School Accounting

Montana Schools Property & Liability Insurance Plan (MSPLIP)

Montana Unified School Trust (MUST)

American Fidelity

Bruco

Natural Essentials

School Services of Montana

Fatbeam

MASBO EXHIBITOR MEMBERS

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
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	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	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
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 Maya Burnaugh mburnaugh@teachersoncall.com	Tyler Technologies Carrie Hughes carrie.hughes@tylertech.com	Todd Watkins Consulting Services Todd Watkins Toddwatkinsconsulting101@gmail.com
Felt Martin, PC Jeffrey Weldon JWeldon@feltmartinlaw.com	Wipfli LLP Kim Dare, CPA kdare@wipfli.com	ABM Education Solutions James Kleinke james.kleinke@abm.com

SUN & SKIN

Sun Protection and Vitamin D

We all need vitamin D. It spurs bone growth. Without it, we'd be at high risk of conditions such as osteoporosis. Vitamin D also gives an important boost to the immune system. Some in the medical community believe it can help stave off any number of diseases. A D deficiency can open a Pandora's box of ailments.

When your skin is exposed to sunlight, it manufactures vitamin D. The sun's ultraviolet B (UVB) rays interact with a protein called 7-DHC in the skin, converting it into vitamin D3, the active form of vitamin D.

The problem is, too many people think that using sunscreen and other forms of sun protection leads to vitamin D deficiency, and that the best way to obtain enough of the vitamin is through unprotected sun exposure. This can lead to a whole other set of serious problems.

BENEFITS OF VITAMIN D, RISKS OF D DEFICIENCY

Vitamin D helps keep your bones strong by regulating calcium levels. Maintaining adequate amounts of the vitamin is essential for your bone health. People deficient in the vitamin can suffer symptoms including—

- Muscle aches
- Muscle weakness and bone pain
- Slower growth, bone softening
- Increased risk of deformities, osteoporosis and fractures

BENEFITS OF SUN PROTECTION, RISKS OF SUN EXPOSURE

There is overwhelming evidence for the multiple benefits of sun protection. Controlled studies have shown that regular use of an SPF 15 or higher broad-spectrum sunscreen reduces your chances of developing squamous cell carcinoma by about 40 percent, melanoma by 50 percent and premature skin aging by 24 percent. It has been proven on the molecular

level that the sun's ultraviolet (UV) light damages the skin's cellular DNA, creating genetic mutations that can lead to skin cancer. Both the U.S. Department of Health and Human Services and the World Health Organization have identified solar UV as a proven human carcinogen, with studies linking it to about 90 percent of nonmelanoma skin cancers and about 86 percent of melanomas, as well as premature skin aging. In addition, UV radiation harms the eyes and can cause cataracts, eyelid cancers and other ocular skin cancers, including melanomas.

You need sun protection as much as you need vitamin D. You can have both, without skin damage or nutritional deficiency.

WHAT IS A HEALTHY LEVEL OF VITAMIN D?

If you're having blood drawn for your annual checkup, ask your doctor to test your vitamin D level. On your lab report, here's what your number means.

BELOW 30—Deficient. Talk to your doctor about supplements.

30 to 50—Generally inadequate for bone and overall health.

50 & ABOVE—Adequate (more is not necessarily better)

125 & ABOVE—Too high (may have adverse effects)

BETTER CHOICES

The question is, if not from UV exposure, how can you obtain enough vitamin D?

It's pretty straightforward, actually. You can acquire vitamin D from a combination of diet and supplements.

- Fatty fish such as salmon, mackerel and tuna
- Egg yolks, beef liver and cheese
- Milk and orange juice are fortified with vitamin D

(Read labels, because foods are fortified only when they say they are.)

You can mix and match these foods to get the daily allowance of 600 International Units (IU) recommended by the Institute of Medicine and The Skin Cancer Foundation for the average person between the ages of 1 and 70.

The bottom line: Food, supplements and incidental, protected sun exposure will give you all the D you need, without subjecting yourself to the multiple risks of unprotected sun exposure.

Source: skincancer.org



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