MONTANA ASSOCIATION OF SCHOOL BUSINESS OFFICIALS

Empowering School Business Leaders Through Education



JUNE 2022

MASBO SUMMER CONFERENCE

Don't hesitate, get registered! This conference is JAM PACKED with presentations from amazing contributors from across the state. Conference is a great time to reconnect, share ideas, and stay updated on upcoming legislation and other changes that will matter to your districts.



Conference is ALSO a great time to have a little fun! Show off your impressive bowling and golfing skills and/or play tourist at the Mining Museum. We can't wait to see you there!

<u>New Clerk Academy Agenda</u> and <u>Schedule at a Glance/Session Descriptions</u> are now available on the Website!

2022 Summer Conference Registration Open: Register HERE: Butte Copper King Hotel June 13-17 New Clerk Academy June 13-15 Summer Conference June 15-17 Copper King MASBO Room Block is full Other options include: Hampton Inn (1.4 miles) MASBO Block \$106+tax/night: 406-494-2250

Best Western Plus Butte Plaza Inn (1.9 miles): 406-494-3500 Comfort Inn (2.2 miles): 406-494-8850

Please email Marie with registration questions.

FY23 MASBO Membership

Invoices will be emailed at the end of June.

If you'd like to be invoiced earlier, please email Marie or select membership in your summer conference registration. No need to renew on our website.

To set up a new employee with a MASBO membership, please have them complete an online membership application: **MASBO Membership**

Please email <u>Marie</u> with any membership questions.

Calling all Retirees!

Please let <u>Marie</u> know if you intend on retiring this year.

We would love to honor your years of service at the upcoming summer conference!



MASBO P-CARD PURCHASE REPORT

APRIL 2021-MARCH 2022 The year to date report is now available on the MASBO website. Check it out <u>here</u>! We are excited for Summer Conference award winner announcements!

Has Your District Experienced a Staffing or Board Member Change?

If your district has experienced a change in membership of your Board, or a change in administrative staff, please remember to update the following organizations.

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 <u>Shelley</u> or <u>Marie</u> for assistance.

MTSBA: Please be sure to login to <u>MyMTSBA</u> 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 <u>Wendy</u> or <u>Emily</u> for assistance.

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

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. This will allow for a much smoother transition for those involved.

President Vice-President Past President Fiscal Agent Ex-Officio, MTSUIP Ex-Officio, OPI

<u>Rita Huck</u>, Huntley Project <u>Belinda Klick</u>, Sun River Valley <u>Lorie Carey</u>, Jefferson Co. H.S. <u>Kim Aarstad</u>, East Helena <u>Jen Mettler</u>, Baker K-12 Vacant

MASBO Board of Directors

Region 1 DirectorLacey Porrovecchio, BigforkRegion 2 DirectorKarsen Drury, CascadeRegion 3 DirectorColleen Drury, ScobeyRegion 4 DirectorKevin Patrick, ButteRegion 5 DirectorRebekah Rhoades, LewistownRegion 6 DirectorStacy Montgomery, Forsyth

MASBO Staff

<u>Shelley Turner</u> Executive Director 406-461-3659 Marie Roach Association Services Coordinator 406-461-8804 <u>Steve Hamel</u> Interim Services/Trainer 406-431-0124

UPCOMING OPPORTUNITIES

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 <u>Compass</u> site.

July 18th- Laurel July 19th- Glendive July 20th- Glascow 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.

<u>OPI Links</u>

New Email Address

If you have a finance question and no longer know who to reach out to at OPI, it is recommended to send emails to the following address which has been recently created. OPISchoolFinance@mt.gov

OPI Finance Calendar

OPI has recently released a <u>School Finance Monthly Calendar</u>. They have encouraged our membership to let them know if there are other items you'd like to see listed as they are still in development of this tool.

OPI Education Compass

At recent region trainings, several OPI staff members have encouraged MASBO members to utilize the monthly <u>Compass</u> site listed above for important information as OPI is attempting to centralize their communication and limit the amount of outgoing email communication. Each division is also releasing a Compass Update. You must scroll to the bottom of the main Compass page to find the links to the division pages. The School Finance Compass can be found <u>here</u>.

In District Special Education Permissive Tuition Levy Spreadsheet

The updated spreadsheet for FY 23 has been posted to the OPI Webpage and may be found here: <u>Tuition and Attendance (mt.gov)</u>.

Preliminary Title Funding Allocations are now available and can be found here.



Utilizing District Financial Resources

FOR LEADERS WHO WANT TO LEARN MORE ABOUT THE MOST EFFECTIVE METHODS USED IN BUDGETING!



with Dr. Marguerte Roza, Director of of the Edunomics Lab at Georgetown University, a research center focused on exploring and modeling education finance policy and practice

JUNE 20, 2022

10:00 a.m. - 5:00 p.m.

Personalized for:

Trustees

Superintendents

District Clerks

Tickets Required

LIMITED SEATING

Reserve Your Seat by June 13, 2022

REGISTER HERE

Questions? Contact @ tristen.loveridge@mt.gov



- Identify Cost Drivers
- Analyze policy impacts

acts Use productive data

Develop financial leadership

Do the math

Know allocations Effective use of ESSER-ARP

Explore Trade-Off

Prioritize impact on student learning outcomes

Strategically Allocate Resources

Learn from the data

LIMTED ZOOM INTERACTION

Classroom le • Her ca offs ha

In Person Residence Inn Bozeman, MT

About Dr. Roza

- Dr. Roza's research traces the effects of fiscal policies at the federal, state, and district levels for their implications on resources at the school and classroom levels.
 - Her calculations of dollar implications and cost-equivalent tradeoffs have prompted changes in education finance policy in all levels in the education system.
 - Dr. Roza is author of the highly regarded education finance book, Educational Economics: Where Do School Funds Go?

MASBO ENDORSES THESE PROGRAMS

AMERICAN FIDELITY	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
WORKERS COMPENSATION RISK RETENTION PROGRAM	Montana Schools Group Insurance Authority Workers Compensation Risk Retention Program Shawn Bubb, Director of Insurance Services 406-457-4500 <u>sbubb@mtsba.org</u> <u>http://www.msgia.org/home</u>
MONTANA UNIFIED SCHOOL TRUST	Health, Dental, Vision, Life and Long-Term Disability Benefits Andy Holmlund , Chief Executive Officer 406-457-4400 <u>aholmlund@ms-sf.org</u> <u>http://mustbenefits.org/</u>
Montana Schools Unemployment Insurance Program	Montana Schools Unemployment Insurance Program Theresia LeSueur , Director 406-457-4407 <u>tlesueur@mtsba.org</u> <u>http://www.mtsuip.org/</u>
MONTANA SCHOOLS PROPERTY & LIABILITY INSURANCE PLAN	Payne West, Inc. Montana Schools Property & Liability Insurance Plan Rody Holman, Program Manager 406-533-1035 <u>RHolman@paynewest.com</u> <u>http://msplip.com/</u>

MASBO EXHIBITOR MEMBERS			
American Fidelity Assurance Company Jacob Bautista, Office Manager jacob.Bautista@americanfidelity.com	Anderson, Zurmuehlen & Co. Stefeni Freese, CPA <u>sfreese@azworld.com</u>	Black Mountain Software Teresa Van Buren teresav@blackmountainsoftware.com	
Bruco, Inc.	C & C School Accounting	D.A. Davidson & Co.	
Adam Uselman, V.PC.O.O.	David Bardwell	Bridget Ekstrom	
adamu@bruco.com	Help@CandCSchoolAccounting.com	<u>Bekstrom@dadco.com</u>	
Fatbeam	Felt Martin, PC	Fisher's Technology	
Graham Taylor	Jeffrey Weldon	Amanda Byrne	
graham@fatbeam.com	JWeldon@feltmartinlaw.com	<u>info@fisherstech.com</u>	
Frontline Education	Horace Mann	Iconergy	
Lisa Sierra	Keith Jorgensen	Carl Hurst	
Isierra@frontlineed.com	<u>keith.jorgensen@horacemann.com</u>	<u>churst@iconergyco.com</u>	
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	Kalmback Consulting	Klimas Financial Services, Inc.	
Jeffrey Patterson	Cathy Kalmback	Charles Klimas	
jeffp@k12mt.com	cathymkal@gmail.com	<u>cklimas@gwnsecurities.com</u>	
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)	Payne West, Inc./MSPLIP	Pine Cove Consulting	
Andy Holmlund	Rody Holman	Brandan Bassett	
aholmlund@ms-sf.org	<u>RHolman@paynewest.com</u>	bbassett@pinecc.com	
School Services of Montana	Teachers on Call	Tyler Technologies	
Thomas Franta	Lesley Hacker	Carrie Hughes	
<u>tfranta@mt-schools.org</u>	Lesley.hacker@teachersoncall.com	carrie.hughes@tylertech.com	
Todd Watkins Consulting Services Todd Watkins Toddwatkinsconsulting101@gmail.com	Wipfli LLP Kim Dare, CPA <u>kdare@wipfli.com</u>		

IMPORTANT DATES & DEADLINES – JUNE 2022

IMPORIANI DAIES & DEADLINES – JUNE 2022		
JUNE 1		
Deadline for trustees to request county election administrator to conduct school elections for next fiscal year	The school district clerk/election administrator is designated the election administrator for school elections. However, the trustees of any district may request the county election administrator (EA) to become the election administrator for school elections. The request must be made by a resolution of the board of trustees. If the county EA accepts, then he/she must perform all the duties the school clerk would have. The school district must assume all costs of the election.	<u>MCA 20-20-417</u> <u>Trustee Resolution –</u> <u>Request for County to</u> <u>Conduct Elections</u>
Last day to amend grants	Last day to request grant amendments (budget and program modifications) for projects that will end June 30.	OPI State and Federal Grants Handbook
Last day to file OPI Form PAA-3 Application for Additional ANB	Trustees must submit form PAA-3 (Application of Additional ANB) to the Superintendent of Public Instruction for opening a new school, creating a new 7-8 grade accredited program, or opening a new kindergarten.	MCA 20-9-313 MCA 20-9-314 Form PAA-3
County Superintendent electronically authorizes second semester transportation claims	County Superintendent electronically authorizes second semester transportation claims (consisting of one copy of each district claim).	<u>MCA 20-10-146(5)</u> <u>A.R.M. 10-7-104(1)(b)</u>
JUNE 10	I	
File monthly claims for NSLP or SSO reimbursement	Monthly lunch, breakfast and snack counts are due the 10 th of each month. Counts are submitted in the Montana Agreement and Payments System (MAPS) for National School Lunch Program (NSLP) or Seamless Summer Option (SSO) reimbursement. See OPI's <u>Back to School Page</u> for more information on SSO and important updates.	Montana Agreement and Payment System (<u>MAPS</u>) log in page <u>School Nutrition Programs</u> <u>Checklist</u> NSLP <u>Reimbursement rates for</u> <u>FY2022</u> SSO <u>Reimbursement rates</u> <u>FY2022 School Nutrition Payments</u>
OPI pays grant cash requests	OPI pays grant cash requests submitted from April 26 – May 25	<u>E-Grants System</u> Log in to your district's account, or click on Public Access, then Vendor Payee Details

IMPORTANT DATES & DEADLINES – JUNE 2022

JUNE 13-17

MASBO Summer Conference in Butte, MT.

JUNE 15		
CSCT payment for May Claims due to OPI no later than June 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
JUNE 17		Accounting Guidance
Grant cash request due to OPI for payment on June 22	Grant cash requests submitted from May 26 through June 17 will be processed and paid on June 22.	OPI State and Federal Grants Handbook
	There are no payments in the month of July. The next grant payment will be made on August 10.	
JUNE 27		
OPI makes K-12 BASE aid payments	Direct State Aid Quality Educator Component At Risk Student Component Indian Education for All Student Achievement Gap Data for Achievement (SPED) State Special Education Transportation	FY2022 Payment Schedule (scroll to bottom of page
JUNE 30		
Last day of fiscal year	End of school fiscal year. All budget appropriations lapse except appropriations for "uncompleted improvements in progress on construction" and properly authorized obligations to purchase personal property in manner prescribed by the Superintendent of Public Instruction.	<u>MCA 20-1-301</u> <u>MCA 20-9-209</u>
	The district may encumber current year appropriations for valid obligations existing as of June 30. Encumbrances outstanding at year end shall be added to current expenditures to arrive at the budgetary basis expenditures for the year.	<u>A.R.M. 10.10.101</u>
Last day to obligate funds for projects ending June 30	Last day to obligate funds for projects ending June 30.	<u>OPI State and Federal Grants</u> <u>Handbook</u>
FY 2021 regular audits are due to OPI	FY 2021 "Yellow Book" audits are due to OPI by June 30, 2022, for entities with federal expenditures less than \$750,000 and revenues greater than \$750,000.	MCA 2-7-503 State of Montana Single Audit Act
	Entities that had revenues less than \$750,000 are required to have a Financial Review once every four years. If your district is required to have a Financial	<u>A.R.M. 2-4-410</u>

IMPORTANT DATES & DEADLINES – JUNE 2022		
	Review for FY2021, the report is due to OPI by June 30, 2021. Please remit audit reports and correspondence to <u>OPIAuditReports@mt.gov</u> . For more information, contact <u>Dan Moody</u> , 406- 444-0701	<u>OPI School Finance Division</u> website – Auditing
Last day trustees may adopt a budget amendment	Board of Trustees may adopt a resolution for a budget amendment due to causes other than an	<u>MCA 20-9-162</u> <u>A.R.M. 10.22.201(4)</u> Budget Amondment Backet
Last day to submit Foster and Group Home Tuition Claims	unusual enrollment increase. Foster and group home tuition claims must be submitted to the OPI through <u>MAEFAIRS</u> .	Budget Amendment Packet MCA 20-5-324

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	<u>MCA 20-1-301</u>
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.	<u>MCA 20-10-125</u> <u>A.R.M. 10.7.101(2)(a)</u>
School Bus Stop Arm Requirements are in Effect	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:	2022 Montana School Bus Standards Publication
	• Be equipped with additional flashing red lights as specified in 61-9-402, MCA;	

IMPORTANT DATES & DEADLINES - JULY 2022		
	• 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.	
	Extended Stop Arm should have an additional illuminated stop sign located at the furthest distance from the school bus.	
JULY 10		
Traffic Education TE06 Year- End Reports due to OPI.	TE06 Year-End Reports are due before July 10 for traffic education courses that ended between July 1, 2021 and June 30, 2022. 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. If you need assistance to complete and submit your TE06, send an email to Dwight.Nelson@mt.gov or call 406-444-4396.	Form TEO6 OPI Traffic Education Forms and Reports
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.	<u>MCA 20-10-132</u> <u>A.R.M. 10.7.101(2)(c)</u>

JULY 25			
Grant cash request due to OPI	Grant cash requests made by this date will be paid on August 10.	<u>OPI State and Federal Grants</u> <u>Handbook</u>	
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: 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 	<u>OPI State and Federal Grants</u> <u>Handbook</u>	
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 (a re-inspect, if needed) the buses prior to the beginning of first semester.	MCA, 20-10-101(4)(a)(i) <u>Regulations & Guidelines for Pupil</u> <u>Transportation Reporting</u> (see page 4) <u>TR13 Instructions</u> <u>TR13 Form-Blank</u> <u>TR13A Form-Blank</u>	





Spring is in the air! With the weather warming up, people are spending more time playing, exploring, and hiking around in the great outdoors. Unfortunately, this also means more quality time with some of natures most nefarious pests.

In the United States, there are 90 different species of ticks. The most common types seen in Montana are the American Dog Tick and the Rocky Mountain Wood Tick, both of which can carry Rocky Mountain spotted fever.

Before heading outdoors, check out the following facts to better prepare for these biting buggers.

Ticks are not insects.

Ticks are often mistaken for insects, but they are actually classified as arachnids. This makes them relatives of spiders, scorpions, and mites. To identify a tick, look closely to see that it resembles a spider with four pairs of legs and no antennae.

Ticks are daredevils.

Ticks cannot jump or fly. They crawl up brush or grass and clasp on with their back legs while stretching out their front legs to grab onto a passing animal or human. They will even let go of their perch all together and free fall onto a passing host.

Ticks are REALLY slow eaters.

Unlike many other biting pests, ticks have to feed for long periods of time. They bury their teeth into the skin of the host to ensure a good grip for several days. Ticks typically require 24 - 48 hours of feeding before they can successfully transmit infections, so prompt removal is crucial.



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cause BIG problems.

Ticks are stubborn.

When removing a tick, it is important to do so **quickly and completely** using tweezers and gloves. There are many old wives tales about how to best remove a tick, but many of these either don't work or can make things worse.

Ticks can become irritated which causes them to latch on tighter or vomit into the bite site, thereby giving the host whatever potential viruses or diseases they may be carrying.

Ticks are animal lovers.

Ticks also love our furry friends. Some tick species, like the American dog tick and brown dog tick, prefer dogs as hosts. Unfortunately, our good boys and girls are easy prey while playing in the yard, tall grasses, or wooded areas. If you're a pet owner, check your pup frequently, especially after walks or playtime. Be sure to check your outdoor cats too!

To avoid one of these little pests from hitching a ride you can:

- Use repellent on yourself and pets
- pretreat your shoes and clothes
- dress appropriately (fuck pants into socks, wear hats to cover hair)
- put your clothes in the dryer on high for 20 minutes after a hike
- take a shower