

MONTANA ASSOCIATION OF SCHOOL BUSINESS OFFICIALS MARCH 2014

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
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A scene from the Budget Workshop in Billings



SPRING REGIONAL WORKSHOPS

(Register at: <http://fs3.formsite.com/masbo/form26/index.html>)

Cost is \$70 per workshop (\$20 cancellation fee)

Region 3	Wednesday, April 2	Sidney (MSU Extension Building)
Region 5	Monday, March 31	Billings (Billings Hotel & Convention Center)
Region 6	Tuesday, April 1	Miles City (Custer County High School Multipurpose Room)

REGION DIRECTOR ELECTIONS TO BE HELD AT SPRING REGIONAL WORKSHOPS

Elections for Region Director will be held at the following spring workshops:

- **Region 3** - Elect a director for July 1, 2014 – June 30, 2017.
- **Region 6** - Elect a director for July 1, 2014 – June 30, 2017.

Nominations may be made

- on the spring regional workshop registration form,
- via email to Denise Williams or the Region Director prior to the spring workshop, or
- from the floor during the business portion of the spring workshop.

Note: It's a good idea to check with the person you wish to nominate to ensure they are willing and able to make a 3-year commitment to serving on the MASBO board.

MASBO Board of Directors

President	Mike Arnold, Havre Schools	Region 1 Director	Cindy Foley, West Valley Schools
Vice-President	Tammy Tulberg, Target Range Schools	Region 2 Director	Brigette Clark, Geraldine Schools
Past President	Jacki Young, Fairview Schools	Region 3 Director	Rhonda Opp, Medicine Lake Schools
Fiscal Agent	Kim Aarstad, East Helena Schools	Region 4 Director	Kim Aarstad, East Helena Schools
Ex-Officio Director	Sherri Hesel, Browning Schools	Region 5 Director	Rita Huck, Huntley Project Schools
Ex-Officio Director	Janelle Mickelson, OPI	Region 6 Director	Della Van Horn, Circle Schools

DO YOU KNOW AN OUTSTANDING BUSINESS OFFICIAL?

MASBO is accepting nominations for 2014 Outstanding School Business Official. Co-workers, teachers, trustees, district administration, other school business officials, OPI employees, and county or state officials may nominate a current, active MASBO member (past recipients, current officers and directors of MASBO are not eligible during their term of office).

Please submit a letter of nomination and two letters of recommendation that support the nomination. The letter of nomination should include the nominee's name, job title and school district and state the specific reasons the person is nominated, including: 1) contributions to public education in Montana at the school, community, county, state and federal levels, 2) contributions to civic and public organizations, and 3) the nominee's service to students. Nomination materials may be emailed to dwilliams@masbo.com.

NOMINATION DEADLINE IS MARCH 31, 2014.

MAY 6, 2014 SCHOOL ELECTION REMINDERS

Download the 2014 Election Calendar <http://www.opi.mt.gov/pdf/SchoolFinance/ElecHB/14ElectionCalendar.pdf> and review the upcoming deadlines.

- Trustee candidates may file for election during December 22, 2013 through March 27, 2014. A sample nomination petition is located on the OPI website at http://opi.mt.gov/pdf/SchoolFinance/ElecHB/Trustee/NominationPetition_Trustee.pdf.
- Trustees must call for an election by Thursday, March 27.
- An individual who has filed as a candidate may withdraw by March 28.
- File resolutions for school election with the county election administrator by Tuesday, April 1.
- Notify election judges of appointment by Friday, April 4.
- Voter registration closes by Monday, April 7. Contact the county clerk and recorder to obtain the absentee ballot list.
- Notice of election is posted Sunday, April 6 through Wednesday, April 16.
- A write-in candidate for a trustee position on a school board must file Declaration of Intent by April 10 by 5:00 p.m.
- The Election Manual, sample forms and other election resources can be found at http://www.opi.mt.gov/Finance&Grants/schoolfinance/Index.html#gpm1_7

UNEMPLOYMENT INSURANCE

(submitted by Theresia LeSueur, Montana Schools Unified Insurance Program)

Are there any "best practices" related to terminating employees?

Before a school district decides to terminate an employee for performance reasons there are several issues to consider:

- Thoroughly investigate and review the facts. If action is required after a major incident, walk away from the situation for a brief cool down period before making any important decisions. If suspension of the employee is necessary to allow time for the investigation, then consider that alternative.
- Allow time for all parties to review the details of the situation.
- Find and obtain statements from witnesses, if applicable.
- Talk with the employee to get his/her perspective.
- Obtain and review all related current and prior documentation.
- Outline the facts of the most recent situation.
- Examine the employee's previous discipline history.
- Examine records of employees with similar infractions and compare the discipline imposed then with the disciplinary action considered now.
- Determine if the employee is in a protected class. If so, determine if there has been disparate treatment (intentional) or treatment that has resulted in disparate impact (not intentional, but nevertheless discriminatory) for this employee.
- Review the facts of the investigation with an objective third person.
- Pinpoint the basis for the possible discharge.
- Determine if the discharge violates any federal or state laws.
- Discuss your decision with an employment attorney or school district counsel.
- Determine the best time and place and carry out the discharge calmly, in a direct but compassionate manner. Consider including a witness in the meeting, if appropriate.
- Document what was said and what was done at the termination meeting.

Remember as a member of MSUIP, you have three (3) hours of pre-loss legal services per employment incident. As always, MSUIP is here to help you with your questions.

MARK YOUR CALENDARS . . .

2014 SUMMER CONFERENCE & NEW CLERK ACADEMY "LIVE TO BALANCE; BALANCE TO LIVE"

New Clerk Academy	June 16 & 17
Summer Conference	June 18, 19 & 20

Billings Holiday Inn Grand
For room reservations, call (800) 465-4329 and ask
for group booking code "MAS"

MASBO ENDORSES THESE PROGRAMS



Healthcare Reform Services
Section 125 Services
Health Savings Account Services
<http://www.americanfidelity.com/home.aspx>

Debbie Braden
Fringe Benefit Consultant
866-576-0201, ext. 26
Debbie.Braden@af-group.com



Montana School Group Insurance Authority
<http://msgia.org/Home.aspx>

Shawn Bubb
Director of Insurance Services
406-442-2180
sbubb@mtsba.org



Dave Pillatzke
Program Manager
406-457-4531
dpillatzke@wsi-insurance.com

Property & Liability Insurance Plan
<http://www.wsi-insurance.com/programs/mt-school-pool/#our-team>



Theresia LeSueur
Director
406-457-4407
tlesueur@mtsba.org

Montana School Unemployment Insurance Program
<http://mtsba.org/InsuranceServices/tabid/98/Default.aspx>

MASBO EXHIBITOR MEMBERS

Foxie Lady Computers, Inc. David Bardwell foxieladyc@aol.com	Tyler Technologies Jeff Melugin Jeff.melugin@tylertech.com	Black Mountain Software Teresa Van Buren teresav@blackmountainsoftware.com
Fellon Insurance Services Dale Fellon fellonins@msn.com	Montana Cooperative Services Andy Garland agarland@mrea-mt.org	Ron Foltz CPA firm Ron Foltz, CPA Ron.foltz@ronfoltzcpa.com
MNJ Technologies Jeremy Downing jdowning@mnjtech.com	Horace Mann Keith Jorgensen keith.jorgensen@horacemann.com	Klimas Financial Services, Inc. Charles Klimas Charles.klimas@securitiesamerica.com
TCPN (The Cooperative Purchasing Network) Derek Anderson danderson@tcpn.org	Johnson Controls Mike Enzler Michael.e.enzler@jci.com	Pine Cove Consulting Brandon VanCleeve bvanclleeve@pinecc.com
Infinite Campus Stephanie Sondrol Stephanie.sondrol@infinitecampus.com	D.A. Davidson & Co. Bridget Ekstrom Bekstrom@dadco.com	Galusha, Higgins & Galusha Kim Dare, CPA Kimberly@ghg-cpa.com
Anderson, Zurmuehlen & Co. Stefeni Freese, CPA sfreese@azworld.com	CHMS, P.C. Doris Leader, CPA doris@chmspc.com	Aesop Substitute Placement Service Jim O'Halloran jim@ohalloran.cc
VALIC John Wing John.wing@valic.com	United Pension Administration Elizabeth Harris upahelp@msn.com	RESA4U/Southwest MT School Services Bruce Grubbs bgrubbs@resa4u.org
Montana Schools Unified Insurance Program Theresia LeSueur tlesueur@mtsba.com	Enlit, LLC Steven Pereus spereus@enlit10.com	Stahlberg & Sutherland Dana M. Smith, CPA dana@flatheadcpas.com
MSGIA-WCRP Shawn Bubb sbubb@mstba.org	Western States School Program Dave Pillatzke pillatzke@wsi-insurance.com	American Fidelity Assurance Company Debbie Braden Debbie.Braden@afgroup.com

NEWS FROM TEACHERS' RETIREMENT SYSTEM

Changes Ahead for TRS Online

(submitted by Emma MacKenzie, Communications Manager, 444-0139)

Montana Teachers' Retirement System (TRS) is in the process of upgrading both our website and our online reporting system for employers.

The first change you will see is the rollout of our new website. We have streamlined and simplified the content and structure to assist you in finding the information that you need. You can expect the new TRS website to go live toward the end of March. You will continue to access online reporting of Payroll Insurance and Wages & Contributions through the Employer section of the website as you do on the current website.

The new online reporting system will be rolled out in two phases. The first phase will be an upgrade to the Payroll Insurance Reporting system. This module is expected to be fully implemented and available for all employers in late July or early August 2014.

We will offer training for employers on using the new Payroll Insurance Reporting system at workshops during the June 2014 MASBO Summer Conference in Billings, on the TRS website, and through online webinars.

The second phase will be an upgrade to the Wages & Contribution Reporting system. We expect to roll out this phase out to all employers during October 2014. Again, we will offer training materials for you through the website and webinars.

We will invite a small group of employers to help us test the two upgraded modules and identify any glitches before the modules go live. Our work with those employers will aid us in designing on-line instruction and other training tools to ensure a smooth transition for everyone.

The online reporting system upgrade will enhance your interactions with TRS by providing screens with a modern look and feel that are far more intuitive to use. TRS staff has found the upgraded system modules to be easy to learn and use; we believe you will also find this to be an easy transition.

We look forward to working with you over the next few months as we make these important upgrades in our online interactions.

GOVERNMENTAL ACCOUNTING & AUDITING NEWS

MSCPA HOSTS 2014 GOVERNMENTAL CONFERENCE

The Montana Society of CPAs' Governmental Audit, Accounting & Financial Reporting Committee is proud to present a conference that focuses on accounting, auditing and reporting issues affecting Montana's local governments. This conference is designed for auditors of local governments, representatives of city, county and district governing boards, and accountants from city, county and school district business offices.

May 9, 2014-----Red Lion Colonial Inn, Helena-----8:00 a.m. – 4:45 p.m.-----9 CPE credits (2 ethics)

To register, go to www.mscca.org or call 406- 442-7301

Bus Safety (from “Safe Pupil”)

(submitted by Brodie Loushin, Montana Schools Property & Liability Insurance Program)

Beware of the “most dangerous piece of equipment on a bus” - **The internal overhead mirror!**

The #1 priority for school bus drivers is to safely transport students to and from their destinations.

Attempting to discipline on-board students while the bus is moving or while other students are entering or exiting the bus can be a recipe for disaster!

While driving your bus, the overhead mirror should be utilized for very brief glances to assess a situation. Do not use the overhead mirror for “discussing” the situation with students, for “stare downs”, or for trying to “catch” misbehavior as it happens.

If you have a situation that is compromising the safe and secure environment on the bus, please follow your district or department’s policy for safely assessing and correcting the problem.

HANDY RESOURCES

FY2015 General Fund Preliminary Budgets- USE THESE RESOURCES FROM OPI!

OPI 2014-15 Preliminary General Fund Budget Data Sheet

<http://opi.mt.gov/pub/index.php?dir=School%20Finance/PreliminaryBudgetDataSheets/FY%202015/>

OPI 2014-15 General Fund Budget Overview and Worksheets

http://opi.mt.gov/pdf/SchoolFinance/Budget/FY14_15GenFundBudgetOverviewWorksheetsv2.pdf

OPI 2014-15 General Fund Budget Excel Spreadsheet

http://opi.mt.gov/pub/index.php?dir=School%20Finance/PreliminaryBudgetDataSheets/PBDSSupport/BudgetSpreadsheet/&file=GFbudgetFY15EIHSK12_F1.xlsx