MONTANA ASSOCIATION OF SCHOOL BUSINESS OFFICIALS MARCH 2016

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/ E-rate Specialist 406-461-8804 or mroach@masbo.com

TRAINING OPPORTUNITIES







MTSUIP/MTSBA/MASBO HOT TOPIC EMPLOYMENT SEMINAR

If you haven't done so already, register for this unique training for everyone in your schools that supervises or evaluates staff. The focus will be on:

- Discrimination Issues
- Pre-employment Inquiries
- Background Checks
- Conducting Effective Evaluations
- Compliance with FLSA
- Top 10 Mistakes to Avoid in Employment Matters

When: Friday, April 15, 8:30 - 4:00

Where: MTSBA 4th Floor Conference Room

863 Great Northern Blvd.

Helena

Who: Send your custodian, kitchen and transportation supervisors, athletic directors, principals, superintendents,

business officials and trustees

Cost: FREE to MTSUIP member districts – you can send as many people as you want!

All non-MTSUIP members will be charged \$125 early registration fee per participant or \$150 onsite registration

fee per participant. Space is limited and will be capped when capacity is reached, so register early.

How: To register, click <u>here.</u>

There is a room block at the Best Western Premier Helena Great Northern Hotel, 835 Great Northern Blvd. Call 406-457-5500 and reference MTSBA "Hot Topic" Employment Seminar when making your room reservation.



The Montana Public Employee Retirement Administration is offering *free, 6-hour, hands-on trainings* on their new retirement administration system, PERIS (Public Employee Retirement Information System) and ERIC (Employer Reporting Information Center. The system will go live on May 2, 2016. *Expect big changes* - it is very different from the system currently in use. You will also have an opportunity to ask questions about reporting requirements. This comprehensive training is a must for school districts, so plan to send someone who works with the PERS reports to one of the locations. There are sessions in Kalispell, Helena and Missoula offered in the next two weeks. Click *here* for more information and to register.



MASBO Board of Directors

President Vice-President Past President Fiscal Agent Ex-Officio, MSUIP Ex-Officio, OPI Tammy Tulberg, Target Range Schools Cindy Foley, West Valley Schools Mike Arnold, Havre Schools Kim Aarstad, East Helena Schools Denise Williams

Denise Williams
Janelle Mickelson

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 Rhonda Opp, Medicine Lake Schools Lorie Carey, Jefferson Co. High School Rita Huck, Huntley Project Schools Jen Mettler, Baker Schools

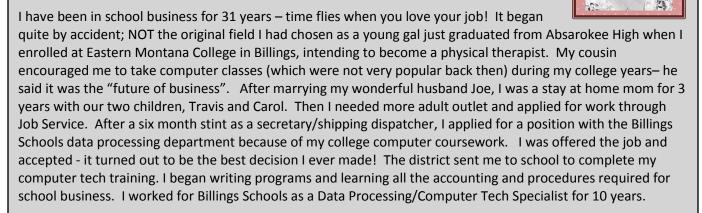
MEET YOUR MASBO BOARD OF DIRECTORS

[To help you get to know the Board of Directors, we'll feature the bio of a different board member each month.]

NOREEN ANDERSON, REGION 1 DIRECTOR

Hello to all MASBO Members -

I am so honored to have been elected to serve as Region 1 Director. MASBO is a wonderful organization and I look forward to serving you in this position.



In 1990, my husband and I bought a heating business in Choteau giving us an opportunity to raise our kids in a small town community. We became involved in Chamber of Commerce, Kiwanis, Choteau Booster Club, Girl Scouts and American Legion. Our children thrived in the small school atmosphere, participating in numerous extra-curricular sports and activities. Two years later, I was back working part-time for Greenfield Elementary as their clerk helping them convert books from paper to computer. In 1995 I was hired as the Business Manager/Clerk for Fairfield Public Schools where I worked for 18 years. We closed the heating business in 2000; Joe went to work for the private prison outside of Shelby taking care of their HAVC systems. A few years ago, Joe retired and we decided it would be nice to be closer to our kids/grandkids. I was fortunate to be hired by Hellgate Elementary SD#4 in January 2013.

We loved our time in Choteau, but nothing beats being in Missoula! I am truly blessed to be a grandparent who is near our grandchildren (Gannon, 8 and Davis, 6); they are such a joy. Joe and I have taken up playing Bridge which is a new thing for these old Pinochle players. Camping and fishing are our first loves and we go as much as we can with our family. We attend many of the local theater productions, shopping, hiking, golfing, and of course, Griz Football and Basketball games! Joe is loving being a "kept man" but he sure is taking good care of me, too ③. My lifelong friendships through MASBO have followed me wherever I have lived in Montana. Thank you again for the opportunity to serve and a chance to give back to all of you.

Sincerely, Noreen Anderson

REGION DIRECTOR ELECTIONS

Elections for Region Director were held at the following spring workshops:

- ➤ **Region 1:** Noreen Anderson was elected to serve March 2016 June 30, 2018 (remainder of the term vacated by Cindy Foley).
- ➤ **Region 2:** Belinda Klick was elected to serve March 2016 June 30, 2018 (reminder of the term vacated by Lucinda Woodland).
- > Region 4: Lori Carey was elected to serve for the three-year term July 1, 2016 June 30, 2019.

Region 5 (election will be held at the regional workshop on April 1):

- o Rita Huck was elected director in March 2013 for July 1, 2013 June 30, 2016.
- Need an election for director for the upcoming term: July 1, 2016 June 30, 2019.

MASBO 2016 SALARY SURVEY

Thank you to the 187 members who responded to the MASBO 2015-2015 Salary Survey! The results are posted on the MASBO website (click *here*).

IN MEMORIAM — LORI SEXTON-TOEWS (Poplar Public Schools)

Lori Sexton-Toews, Assistant Clerk at Poplar Schools, passed unexpectedly on February 17. Her obituary is available online (click <u>here</u>). Lori has been a familiar and friendly face at MASBO events for the past several years, and we'll miss her at the summer conference. Please keep Lori's family in your thoughts and prayers.



P-CARD NEWS-----

MASBO P-CARD PURCHASES REPORT

P-Card purchases for April – February (11 months) totaled **\$14,347,151** with 104 districts and special education cooperatives showing spending in the program. Last year at this time, there were 87 participants spending \$11,505,022. Click *here* to see the current year p-Card report. As of today, there are **105** districts participating in the program!

GOT ANY p-CARD TIPS or TRICKS?

MASBO members always have great ideas for how to make work easier, and this no doubt applies to p-Cards. Send us a brief write-up of your best tip or trick and we'll share it with everyone in the MASBO newsletter.

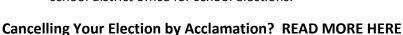
NEW P-CARD CONTACT

Effective March 14th, 2016 **Kevin Noren** will be supporting the IASBO program as the Senior Relationship Manager. Kevin was born and raised in Bolingbrook, IL, and attended Arizona State University, the University of Utah, and graduated with a BS degree from Illinois State University in 1998. Kevin previously worked at JCPenney in their accounting center in Salt Lake City managing the accounts payable post audit recoveries program. Kevin then moved to Seattle where he worked for Starbucks Coffee Co., managing the corporate T&E and procurement card programs, later moving to the internal audit department. While at Starbucks, Kevin was asked to join US Bank where he managed a portfolio of both commercial and public sector card clients, later specializing in the public sectors of K-12, higher education, and state and local governments. Kevin joined BMO a little over a year ago, where he was most recently working with commercial middle market card clients. Kevin currently enjoys living the mountain life in Bend, OR with his wife, his 2 boys, and the Labrador. Even after all of the years out west, Kevin is still a 100% Chicago sports fan! Kevin's email is kevin.noren@bmo.com. His phone (cell) is 541-215-2006.

ELECTION DAY - MAY 3, 2016

Important Election Resources:

- School Elections Calendar 2016 (click <u>here</u>). The calendar includes all the important deadlines for this election and includes links to sample forms.
- **2016 Election Manual** (click <u>here</u>). Contains frequently asked questions about all phases of school elections.
- Guidance to County Election Administrators and School Clerks (click <u>here</u>).
 Co-authored by the Secretary of State's Office and the Office of Public
 Instruction, this document helps sort out the duties and responsibilities of the county election office and the school district office for school elections.



If your school district is running a <u>trustee election only</u> on May 3 this year, you are likely aware that, on April 1, your trustees are allowed to cancel the election by acclamation if the number of candidates filing a nomination petition or filing a declaration of intent to be a write-in candidate is equal to or less than the number of open trustee positions to be elected. Also, you must notify your county election administrator when you cancel an election.

We need your help. If you cancel your trustee election by acclamation, will you please take a moment to also notify the Secretary of State's office. Send an email to soselections@mt.gov and include your school district's name and county in your message.

WHY? Late voter registration applies to school elections beginning with this school election year. If an elector registers late in a different district than the one he/she was previously registered in, county and school district election administrators will need to contact the election administrator in the previous district to see if the elector voted there already.

Example: John Doe is registered in Montana City (Jefferson County) and moves to East Helena (Lewis & Clark County). On May 3, John goes to the Lewis & Clark County election office to late register so he can vote in the school election in East Helena that day. Lewis & Clark County will issue a Certificate of Registration that he can take to the East Helena school clerk so he can obtain a ballot and vote there. Before issuing a ballot to John, the election administrator for the East Helena election will have to check with the election administrator for the Montana City School election to see if John has already voted in their election. If he hasn't voted there, *or if Montana City cancelled their election by acclamation (and they are not running any other election on May 3), John would be given a ballot to vote in the East Helena election.*

However, if Montana City <u>is</u> conducting an election, and John was issued a ballot but Montana City has not yet received his voted ballot, Joe must be issued a provisional ballot by the East Helena school district. After the election, the two school clerks must work together to ensure that the provisional ballot for the East Helena election is counted only if Montana City had not received a voted ballot by 8 p.m. on election day.

To streamline the process and to prevent the unnecessary work involved in processing a provisional ballot, it would be helpful to know ahead of time which school districts have cancelled their election by acclamation and therefore, will not be conducting an election on May 3.

Note: This request is only for school districts that, effective April 1, will not have to run an election on May 3. If you will continue on and run a different type of election on May 3, such as a general fund levy or building reserve levy, or other special election, you don't need to notify the Secretary of State's office of your trustee election cancellation. But remember to notify the county election administrator of any election cancellation.

Thanks, and if you have any questions, you can contact your county election administrator, the Secretary of State's office, Nicole Thuotte at OPI or Denise Williams.





MASBO ENDORSES THESE PROGRAMS



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

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



Healthcare Reform Section 125 Services Health Savings Account Services **Cheryl Brandt,** State Manager 877-589-2544, ext. 353

<u>Cheryl.Brandt@americanfidelity.com</u> http://www.americanfidelity.com/home.aspx



Property & Liability Insurance Plan

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

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



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

Christi Sharp, Chief Executive Officer 406-457-4510

csharp@ms-sf.org

http://mustbenefits.org/

IMPORTANT DATES & DEADLINES				
MARCH 24 – APRIL 23				
Post Notice of Election (Not less than 10 days, or more than 40 days before election day)	The election notice must be published in a newspaper of general circulation in the district if available, posted in at least three public places in the district AND posted on the district's website for the 10 days prior to the election, if the district has an active website. Notice using any other recognized media may be used to supplement the posting. The notice must include: 1) the date and voting locations for the election; 2) voting location hours; 3) each proposition to be considered by the electorate; 4) the number of trustee positions, if any, subject to election and the length of the terms for those positions; and 5) where and how absentee ballots may be obtained. • If the polling place has changed from the previous school election, that change must be referred to in the notice. • If more than one proposition will be considered in the same district, each proposition must be set apart and identified, or placed in separate notices.	MCA 20-20-204 Sample form: Notice of Annual School Election – Mail Ballot Sample form: Notice of Annual School Election – Polling Place		
APRIL 1				
Notify election judges of appointment	At least 30 days prior to election day, appoint three or more election judges for each precinct, one of whom must be designated chief judge.	MCA 13-4-101 School Elections Calendar 2016		
Election by Acclamation and Cancellation of Election	If the number of candidates filing a nomination petition or filing a declaration of intent to be a write-in candidate is equal to or less than the number of open trustee positions to be elected, the trustees may cancel the trustee election. They must then give notice that a trustee election will not be held. The trustee election may not be declared by acclamation until all candidate filing deadlines have passed. Send a copy of your election cancellation notice to the county election administrator to aid with the provisions of late registration.	MCA 20-3-313 Sample form: Notice of Trustee Election Cancellation		
Election administrator certifies ballot	Not less than 30 days prior to election day, the election administrator prepares the final ballot form, listing all candidates and propositions to be voted upon. Trustees must pass a resolution stating exact levy amounts by this date in order for the clerk to certify the ballot. This resolution must include the durational limit, if any, on the levy.	MCA 20-20-401 Sample forms: Sample Ballot Ballot – Trustee Election Ballot – General Fund Levy Ballot – Building Reserve Levy MCA 15-10-425		

IMPORTANT DATES & DEADLINES				
APRIL 4				
Close of regular voter registration	Registration forms postmarked by this date and received within 3 days are accepted for regular registration. Late registration must be completed at the county election office (not at the school district).	MCA 13-2-301		
	NOTE: Between March 6 and April 3, post a notice of the close of regular registration and availability of late registration. The notice must include when and where a voter may register and obtain a ballot. The notice must be published in a newspaper of general circulation in the district, if available, posted in at least three public places, AND posted on the district's website for the 10 days prior to the election, if the district has an active website. Notice using any other recognized media may be used to supplement the posting.	MCA 13-2-301 MCA 20-20-204 Sample form: Notice of Close of Regular Registration		
	After closing regular registration, the county election administrator shall prepare a list of registered electors for each polling place established by the trustees. The list for each polling place must be prepared in the format of a precinct register book.	MCA 20-20-312		
Obtain the biennial absentee voter list from the county election administrator	The county election administrator is required to mail an address confirmation form to voters who previously requested an absentee ballot for all elections. The county election administrator sends the confirmation form in January of every even-numbered year (in mail ballot elections, ballots are sent under mail ballot procedures rather than under absentee ballot list procedures).	MCA 13-13-212 Guidance to County Election Administrators & School Clerks (see item 5)		
Test Window Absences & Aggregate Hours Collection is due in AIM	The Test Window Absences & Aggregate Hours Collection is used to collect the Aggregate Hours of Instruction and Absent Counts of all students enrolled on the Test Window Count Date (March 22, 2016). The Test Window Count Date is the second Count Date used to calculate the AYP attendance rate.	AIM Collection Schedule Test Window Absences & Aggregate Hours Guide		
APRIL 10				
File school food program claim for reimbursement with OPI	Claims for reimbursement are due on the 10 th of each month; except months with less than 10 operating days. If a month has less than 10 operating days, combine the month with another (i.e., combine August and September on the September claim and May and June on the May claim).	School Nutrition Programs Checklist FY2015-2016 Reimbursement Rates		

IMPORTANT DATES & DEADLINES APRIL 10 (continued)				
APRIL 11				
Test Window Program Participation Collection is due in AIM	Test Window Program Participation data is used to determine sub-groups for AYP calculations. Subgroups are calculated by Race/Ethnicity, Meal Status (Free/Reduced Lunch), Limited English Proficiency (LEP Status) and Immigrant Status. The collection looks at student participation as of March 22, 2016 (Test Window Count Date) and must be completed by April 11, 2016.	AIM Collection Schedule AIM Program Participation Collection Guide		
APRIL 13				
Poll Elections: Absentee ballots available	At least 20 days before election day, the election administrator prepares ballots for absentee voters. Remember to enclose the following in the absentee package: 1) The ballot (with stubs removed) 2) Instructions for voting and returning the ballot 3) A secrecy envelope, free of an marks that would identify the voter 4) A self-addressed, return envelope with affirmation printed on the back of the envelope	MCA 13-13-205(1)(b) MCA 13-13-214 MCA 20-20-401(2) Absentee Voter Materials		
APRIL 13 – APRIL 18				
Mail Ballot Elections: Mail ballots mailed to voters	Not before the 20th day nor later than the 15th day prior to election day, all ballots must be mailed on the same day, except that if an inactive elector reactivates after the ballots are mailed, the elector should be provided with or mailed a ballot. If the elector reactivates after noon on the day before election day, the elector must come in on election day to receive a ballot.	MCA 13-19-207 Mail Ballot Election Materials		
APRIL 22				
OPI makes K-12 BASE aid payments and Pupil Transportation payment	(DSA) Direct State Aid (QEC) Quality Educator Component (ARC) At Risk Student Component (IEA) Indian Education for All (SAG) Student Achievement Gap (SPED) State Special Education Payments (D4A) Data for Achievement (NRD) Natural Resource Development (TRAN) Transportation Payments	FY2016 Payment Schedule State Payments to School and Cooperatives		

IMPORTANT DATES & DEADLINES APRIL 25				
Carl D. Perkins 'Intent to Apply' AND State CTE/VoEd Funding Applications due	The OPI has combined both the federal Carl D. Perkins 'Intent to Apply' AND the State CTE/VoEd Funding application for school districts' convenience. You can apply for one or both funding programs using this one electronic form. Authorized representatives of Local Education Agencies (LEAs) will use the online link to access and complete the brief electronic form for the 2016-2017 E-Grants cycle. All public high schools and K-12 districts with qualifying Career and Technical Education (CTE) programs are eligible to apply for funding. Elementary districts are not eligible for Perkins or State CTE/VoEd monies. Districts will NOT receive a 2016-2017 Perkins allocation unless this electronic form is completed and submitted online at the OPI on or before the deadline. These designations are binding and cannot be changed once allocations have been downloaded into the E-Grants system.	Online link to Application If you have questions, please contact Christy Hendricks, OPI CTE/Perkins Data Control Specialist, at chendricks@mt.gov or by phone at 406-444-9019.		
APRIL 30				
Form 941 for Quarter !is due	Form 941 payroll report for Quarter 1 (January, February and March) is due.	Form 941 Form 941 Instructions		
CTE Spring Data Collection due	The Spring Career & Technical Education Data Collection identifies all 12th grade students during the current school year who have met the definition of a CTE Concentrator. This collection meets the accountability requirements for the Carl D. Perkins federal grant.	CTE Quick Reference Guide CTE Tips & Tricks		
Indirect Cost Applications for FY2017 grants are due to OPI	Application forms to request an indirect cost rate for fiscal year 2017 are posted on the OPI website. This form is optional, but is required if your district plans to charge indirect costs to federal and state grant awards using an indirect cost rate. Application for an indirect cost rate does not increase the amount of your grant awards. For compatibility with the E-grants system the closing date for applying for an Indirect Cost Rate is April 30.	Indirect Cost Cover Letter Indirect Cost Rate Materials		

ASBO INTERNATIONAL

DUES INCREASE

Professional membership dues will increase from \$219 to **\$225** starting April 1, 2016. You can renew your ASBO membership when you register for the MASBO summer conference, and when you do, MASBO gets to keep \$10. For information about ASBO International, including member benefits, click *here*.

EMERGING SCHOOL BUSINESS LEADERS SCHOLARSHIP

The Emerging School Business Leaders Scholarship supports 18 rising school business leaders with:

- 1) a \$2,000 scholarship to put toward travel and registration expenses for the 2016 ASBO International Annual Meeting & Expo, and
- 2) a strong network of peers and mentors dedicated to helping the development of their school business careers.

For more information and application materials, click *here*.

2016 ANNUAL MEETING & EXPO - Save the Date

The ASBO International Annual Meeting & Expo will be held September 23-26 in Phoenix, AZ this year. Click <u>here</u> for more information, including general session speakers and a tentative schedule.

MONTANA PUBLIC EDUCATION CENTER (MT-PEC)

2016 MT-PEC GREAT WORKS OF MONTANA'S PUBLIC SCHOOLS VIDEO

Click <u>here</u> for a brochure that explains how you can submit a one-minute video to show us why your school is the best. We're not looking for fancy videos, just GREAT videos! Is there a special teacher that is GREAT? Has the school board worked hard to overcome a particular problem? Has something GREAT happened within the community because of your school? What innovation has your school found that's advancing student achievement? Has there been a particular matter that's been brought before the school board that as changed things for the better? GREAT things are happening in your schools – now is the time to show everyone! Deadline is June 15, 2016.

Key Characteristics that make our public schools so great:

- Governed by Elected Trustees
- > Responsive to the Needs of Each Community
- Excellent, Efficient, Equitable and Empowered
- ➤ Advancing Student Achievement for Each Child
- > Trusted through Transparency and Openness

LANDSCAPE OPEN NOW SPRING IS HERE IM SO EXCITED I WET MY PLANTS

MT-PEC Website

The MT-PEC website (<u>www.mt-pec.org</u>) provides the public with facts about the GREAT work of Montana's public schools. You can find online publications of The Great Work of Montana's Public Schools and K-12 Issue Spotlights on various topics affecting public education in Montana.



PAYROLL TOPIC HIGHTLIGHT — 1099 REPORTING

The Internal Revenue Service imposes strict 1099 reporting requirements. If you paid \$600 or more for services to a non-incorporated entity or an individual for business purposes, you are most likely required to file a Form 1099. Now is a good time to review the rules and set up good procedures for 2016. WipFli CPAs and Consultants has a handy resource posted on their Small Business Services website called **1099 Information Reporting Guide for Small Businesses** (click **here** to access).



MASBO EXHIBITOR MEMBERS				
NEW!	Jeffrey Weldon Felt, Martin, Frazier & Weldon, PC JWeldon@feltmartinlaw.com			
D.A. Davidson & Co. Bridget Ekstrom Bekstrom@dadco.com	CHMS, P.C. Doris Leader, CPA doris@chmspc.com	Black Mountain Software Teresa Van Buren teresav@blackmountainsoftware.com		
Foxie Lady Computers, Inc. David Bardwell foxieladyc@aol.com	Ron Foltz CPA firm Ron Foltz, CPA Ron.foltz@ronfoltzcpa.com	Fellon Insurance Services Dale Fellon fellonins@msn.com		
Southwest MT School Services Bruce Grubbs bgrubbs@swmss.ccsend.com	Pine Cove Consulting Brandan Bassett bbassett@pinecc.com	MSGIA-WCRRP Shawn Bubb sbubb@mstba.org		
Montana Schools Unemployment Insurance Program Theresia LeSueur tlesueur@mtsba.com	Montana Unified School Trust Christi Sharp csharp@ms-sf.org	Klimas Financial Services, Inc. Charles Klimas cklimas@gwnsecurities.com		
Wipfli/GHG Kim Dare, CPA kdare@wipfli.com	Montana Schools Property & Liability Insurance Plan (MSPLIP) Dave Pillatzke dpillatzke@paynewest.com	Todd Watkins Consulting Services Todd Watkins Toddwatkinsconsulting101@gmail.co m		
Infinite Campus Stephanie Sondrol Stephanie.sondrol@infinitecampus.com	Horace Mann Keith Jorgensen keith.jorgensen@horacemann.com	Frontline Technologies Jim O'Halloran johalloran@frontlinetechnologies.co m		
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Edie Barnard Edie.barnard56@gmail.com	Anderson, Zurmuehlen & Co. Stefeni Freese, CPA sfreese@azworld.com	American Fidelity Assurance Co. Cheryl Brandt Cheryl.Brandt@americanfidelity.com		
VALIC John Wing John.wing@valic.com	Tyler Technologies Darlene Markegard Darlene.Markegard@tylertech.com	TCPN (The Cooperative Purchasing Network) Derek Anderson danderson@tcpn.org		