MONTANA ASSOCIATION OF SCHOOL BUSINESS OFFICIALS



Empower School Business Leaders Through Education **MARCH 2019**



MASBO SPRING WORKSHOPS

Sign up for Spring Region Workshops by clicking on the links below. You'll see an agenda, hotel reservation information and a link for registration.

Monday, April 1	Region 4 Spring Workshop in Butte
Wednesday, April 3	Region 2 Spring Workshop in Great Falls

Please register as soon so we have an accurate count for handouts, lunch, etc.







HOT TOPIC EMPLOYMENT SEMINAR April 10 in Helena

FREE to MTSUIP member districts – you can send as many people as you want! All non-MTSUIP members will be charged \$125/participant early registration fee (\$150 onsite registration)

Topics to be covered:

- The 10 "Hot Topic" Issues in Employment Law
- Conflict Resolution
- Innovations and Expectations
- Privacy and Security training

For more information and to register, click **here**.

MSCPA 2019 GOVERNMENTAL ROUNDTABLE AND GAAFR CONFERENCE

Great Northern Hotel - Helena

The Montana Society of CPAs offers the following training on local government accounting and auditing topics:

Governmental Roundtable - May 1

10:00 am – 4:30 pm 6 hours CPE credit Montana CPAs discuss various topics

GAAFR Conference - May 2

8:00 am – 4:00 pm 8 hours CPE credit Topics: GASB Update by David Bean Auditing Standards update by Rick Reisig

ASSISTANCE FOR BUSINESS CLINICS

Good training for your human resources and payroll staff!

The Assistance for Business Clinic is hosted by the following Montana state agencies:

- Department of Labor & Industry
- Department of Public Health & Human Services
- > Department of Revenue
- Employer Support of the Guard & Reserve.

For more information (schedule, registration link and agenda), click <u>here</u>.

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 <u>Noreen Anderson</u>, Hellgate K-8 School Region 2 Director <u>Belinda Klick</u>, 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

<u>Denise Williams</u>, Executive Director 406-461-3659

Marie Roach, Administrative Assistant 406-461-8804

400 401 0004

MASBO SUMMER CONFERENCE & NEW CLERK ACADEMY – JUNE 10-14 in GREAT FALLS

"REACH FOR THE STARS!" is the theme for the MASBO Summer Conference. Conference week kicks off with the New Clerk Academy on June 10, a special schedule for June 11 and even more sessions on June 12. Summer Conference starts on Wednesday, June 12 and runs through 1:00 on Friday, June 14 The schedule is shaping up to provide some great training sessions, fun social events and plenty of time to network with colleagues and exhibitors. Watch for a special email announcing registration and the conference schedule. For hotel reservation information, please see www.masbo.com.

SUMMER CONFERENCE SUNSHINE FUND

Each year at the summer conference, MASBO holds a silent auction of member-donated items to raise money for the Sunshine Fund. The Sunshine Fund is a great way to help MASBO members that have incurred extensive medical bills due to illness. Please notify your Region Director or the MASBO office if you know of a MASBO member who might need this help. Also, put on your shopping shoes and bring items for the silent auction with you to the conference!

KNOW OF ANYONE RETIRING THIS YEAR?

If you are planning to retire or know of anyone who is retiring, please contact us at the MASBO office by May 15, 2019. The Board of Directors would like to give special recognition to retirees at the annual summer conference in June.

ACCEPTING NOMINATIONS FOR MASBO VICE-PRESIDENT

The MASBO Board of Directors is now accepting nominations for Vice-President. This office is elected at large for a 2-year term beginning July 1, 2019, and automatically succeeds to President for a 2-year term, then to the office of Past-President for another 2-year term. The total time commitment for this level of leadership is 6 years.

The Vice-President should be familiar with the MASBO by-laws and policies and procedures, perform the duties of the President in her absence, attend all board meetings, attend an Executive Board meeting to develop a budget for the upcoming year, oversee the mentoring program, and perform other duties as delegated by the President.

You may nominate someone for Vice-President by doing one of the following:

- 1. Send an email to Denise at dwilliams@masbo.com, or
- 2. Nominate the person at your spring regional workshop during the MASBO business meeting, or
- 3. Nominate the person at the 2019 MASBO summer conference opening business meeting.

Note: Please visit with the person you intend to nominate so that they have a chance to consider the time commitment and discuss it with their family, superintendent and/or board before accepting the nomination.



WWW.MASBO.COM

LOG IN ON THE MASBO WEBSITE

All current MASBO members are set up with a user name and password. If you need your sign in information or have questions about the website, please contact Marie at mroach@masbo.com or 406-461-8804.

MASBO CALENDAR

The MASBO Calendar shows important deadlines and reminders for each month. Click on Resources, then Calendar.

DISCUSSION FORUM - check it out!

Lots of good information has been shared on the Discussion Forum this past year. Here's how to post a question or comment:

- 1. Log in
- 2. Go to Discussion Forum
- 3. Select applicable forum/category
- 4. Click +New Thread
- 5. Type your subject & message (to attach a file, select "Browse" to upload)
- 6. Post

Discussion Forum Search is as easy as 1-2-3

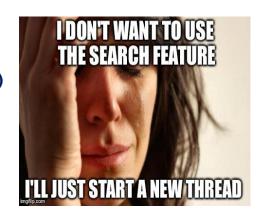
- 1) Click Search
- 2) Enter Search Phrase
- 3) Select '-' from drop down menu next to day(s)

Forums

Welcome to the MASBO Discussion Forum You are logged in as Your Name (Your Email)



Home Search Profile Member List Blogs My Threads Private Messages Logout



Search Criteria:			
	Search Phrase: INTERVIEW QUESTIONS Match All Words		
Posted By:	<u>S</u> earch		
	Date Criteria: Search for messages posted in the last day(s).		
	OR Posted between and		



P-CARD NEWS----

MASBO P-CARD PURCHASES REPORT

P-Card purchases for ten months of the rebate year (April – February) totaled over \$20.5 million with 137 school districts and special education cooperatives participating in the program. At the same time last year, we had 130 participants with over \$18 million in total purchases. Click *here* to see the current year P-Card purchases report.

FIND MASBO on FACEBOOK

If you have a Facebook account and want to keep up with MASBO, go to our Facebook page and hit "Like". This is an additional way that we will communicate with our members and we're excited to have it up and running!







NEWS FROM ASBO INTERNATIONAL

Complimentary Annual Conference and Expo Registration Drawing

Enter to win 1 of 16 FREE registrations to the 2019 Annual Conference & Expo in October in National Harbor, MD. Winners will also be invited to an exclusive meet and greet with First General Session Speaker Ariane de Bonvoisin. Open to ASBO International members and non-members. **New Deadline!** Enter by May 23.



Emerging Leaders Scholarship

Open to ASBO International members and non-members, this is a \$2,000 scholarship toward attendance at ASBO International's Annual Conference & Expo for school business officials with five or fewer years of experience.

Nominate or Apply by June 1.

Pinnacle Awards

The Pinnacle Awards celebrate the work of outstanding individuals whose original solutions maximize resources and enhance student achievement. Applicant must be a member of ASBO International and/or an affiliate.

<u>Apply</u> by May 1.

Eagle Awards

Eagle Awards celebrate school business officials who go above and beyond the day-to-day to serve students. Applicant must be an active professional member of ASBO International.

Nominate or Apply by June 1.

MASBO ENDORSES THESE PROGRAMS



Healthcare Reform Section 125 Services Health Savings Account Services Jacob Bautista, Office Manager 877-589-2544

<u>jacob.bautista@americanfidelity.com</u> http://www.americanfidelity.com/home.aspx



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



Health, Dental, Vision, Life and Long-Term Disability Benefits **Andy Holmlund,** Chief Executive Officer 406-457-4400 **aholmlund@ms-sf.org**



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

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

http://mustbenefits.org/



Payne West, Inc.

Montana Schools Property & Liability Insurance Plan **Rody Holman,** Program Manager 406-533-1035

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

IMPORTANT DATES & DEADLINES - APRIL 2019

MARCH 28 - APRIL 27

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;
- 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

MARCH 1- APRIL 30

CTE Data Collection March 1 through April 30

The Career and Technical Education (CTE) Spring Data Collection is an AIM collection where schools identify all 12th grade high school students who were enrolled at any point during the current 2018-2019 school year who meet the definition of a CTE Concentrator. CTE Concentrators are 12th graders who have earned three (3) or more credits in any CTE program in any combination during their years of high school.

Spring Career & Technical Education (CTE) Collection Instructions

APRIL 4

Last day trustee candidates can withdraw from the election.

Any candidate who has already filed for election, but wishes to withdraw their name, may do so by sending a statement of withdrawal to the election administrator by 5:00 p.m. on April 4.

MCA 20-3-305 (3)(a)

Deadline for write-in candidate for a trustee position on a school board to file a Declaration of Intent A person seeking to become a write-in candidate for a trustee position shall file a declaration of intent no later than 5 p.m. on the day before the ballot certification deadline in 20-20-401 (not less than 30 days before election day).

MCA 20-3-305 (2)(b)

<u>Declaration of Intent and Oath of</u> <u>Candidacy for Write-In Candidates</u>

IMPORTANT DATES & DEADLINES - APRIL 2019		
APRIL 5		
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 and 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
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 2018 School Election Calendar
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: Ballot – Trustee Election Ballot – General Fund Levy Ballot – Building Reserve Levy MCA 15-10-425
APRIL 8		
Close of regular voter registration	Registration forms postmarked by this date and received within 3 days are accepted for regular registration. Beginning April 9, late registration must be completed at the county election office (not at the school district).	MCA 13-2-301 MCA 20-20-312 MCA 13-2-304
Obtain absentee voter list from the county election administrator	Montana law allows electors to request and receive an absentee ballot for each subsequent election (including school elections), provided the elector remains at the same address and remains qualified to vote. Each county maintains its own list.	MCA 13-13-212
APRIL 9		
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 19, 2019). 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

IMPORTANT DATES & DEADLINES – APRIL 2019				
APRIL 9 (continued)				
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 19, 2019 (Test Window Count Date) and must be completed by April 9, 2019.	AIM Collection Schedule AIM Program Participation Collection Guide		
APRIL 10				
File monthly meal claims for NSLP 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) reimbursement.	Montana Agreement and Payment System (MAPS) log in page School Nutrition Programs Checklist Reimbursement rates for FY2019 FY2019 School Nutrition Payments		
OPI pays grant cash requests	OPI pays grant cash requests submitted by the 25 th of the previous month.	E-Grants System Log in to your district's account, or click on Public Access, then Vendor Payee Details		
APRIL 17				
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 17 – APRIL 22	Not hefere the 20th decree lets the delt.	MCA 12 10 207		
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		

IMPORTANT DATES & DEADLINES – APRIL 2019				
APRIL 25				
Grant cash request due to OPI	Grant cash requests made by this date will be paid on April 10.	OPI State and Federal Grants Handbook		
APRIL 26				
OPI makes K-12 BASE aid payments	(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 *(TECHF) Technology Funding **(D4A) Data for Achievement *** (NRD) Natural Resource Development	FY2019 Payment Schedule (scroll to bottom of page State School Payments *Redirected as per HB390 **Suspended for FY2019 (SB261) ***Redirected as per HB647		
FY 2019 Small, Rural School Achievement (SRSA) grant application due	LEAs should only apply for the SRSA grant if they are noted as eligible for the grant in FY 2019. LEAs should check the FY 2019 Eligibility Spreadsheet on the SRSA and RLIS websites to see if they are eligible for the SRSA grant in FY2019. Only SRSA-eligible (including dual-eligible LEAs that choose the SRSA grant) or Hold Harmless eligible LEAs should submit an FY2019 SRSA grant application.	U.S. Department of Education Small Rural School Achievement Program Grants.gov Montana Small Schools Alliance 2019 SRSA/REAP Resources OPI Summary of Activities — February (see page 10)		
APRIL 30				
Form 941 for Quarter 1 is due	Form 941 payroll report for Quarter 1 (January, February and March) is due.	IRS Form 941 Instructions for Form 941		
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		
Indirect Cost Applications for FY2020 grants are due to OPI	Application forms to request an indirect cost rate for fiscal year 2020 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		

SCHOOL ELECTION REMINDERS

SCHOOL ELECTIONS

The regular school election day is **May 7, 2019**. Click <u>here</u> to see the School Election Calendar, which has been updated to reflect the various deadlines. The calendar also shows the forms related to each task. Some items to note:

- Last day for a candidate to withdraw from the election is April 4 (must send a statement of withdrawal to the election administrator).
- Deadline for a write-in candidate to file a Declaration of Intent is April 4.
 The form must be filed with the district clerk, regardless of who is Running the election.
- On April 5, if your trustees are able to cancel the trustee election and declare trustees elected by acclamation, send a copy of your cancellation notice to the county election administrator to aid in the provisions of late registration.
- > By April 5, notify your election judges of appointment.
- Certify your ballot by April 5. Make sure all names of candidates are correct and determine levy amounts and durational limit if running a levy election. It doesn't hurt to have a second set of eyes (i.e., someone else) review the ballot language and details before printing.
- On April 8, ask your county election administrator for the absentee ballot list. Also, since April 8 is the close of regular registration, have a conversation with your county election administrator about the late registration process.
- > Running a polling place election? Absentee ballots must be available by April 17.
- > Running a mail ballot election? Mail all the ballots on the same day, between April 17 April 22.
- The <u>School Election Handbook</u> and many forms used in school elections are posted on the OPI website. Click <u>here</u> to see the Elections Resources page.

Montana Ballot Interference Prevention Act Requirements

NEW

Be sure to read the guidance about the Montana Ballot Interference Prevention Act posted on the OPI website (click <u>here</u>). There are rules regarding the return of absentee or mailed ballots by an individual other than the voter and these apply to your May 7, 2019 election.

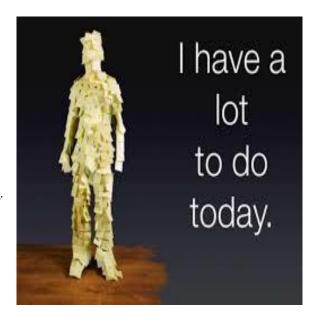
WORKING ON YOUR FY2020 BUDGETS?

Check out the following resources posted on the OPI website:

- FY2020 General Fund Overview & Worksheets
 This document provides descriptions of the various funding components and has worksheets so you can work through the calculations yourself.
- FY2020 Preliminary General Fund Data Sheets
 Find the document for your county, then find your district's report. Use to check your math on the worksheets and/or OPI's Excel spreadsheet.
- FY2020 General Fund Budget Worksheet
 Start at the Inputs tab and use in conjunction with the General Fund Overview and Preliminary Budget Data Sheets.
- FY2019 Transportation Budgeting Worksheet
 Enter your bus routes and individual contracts. This spreadsheet calculates the on-schedule costs and contingency amounts needed for your Transportation Budget calculations.

STATE PAYMENTS TO SCHOOLS AND COOPERATIVES

OPI posts an electronic <u>Payment Advice</u> on their website each month after it distributes state payments to schools and cooperatives. Click on this link to access the reports for payments made during FY2018-2019. These reports may be useful when you're balancing your cash balances to the county treasurer's report, or if you're trying to project year-end fund balance and need to know about how much you'll be receiving in the coming months through fiscal year end.



MASBO EXHIBITOR MEMBERS			
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.PC.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 Peter Lane plane@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	
National IPA and TCPN Shelley Andrews shelley.andrews@nationalipa.org	New Hope Technology Foundation John Hughes john@newhopetech.org	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	TimeClock Plus James Baker sales@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	

Immunizations are an important safeguard for your child's health

Stick to the schedule!

Next to safe drinking water, immunizations have been called the most important public health intervention in history. Immunizations have saved millions of lives from diseases that used to be a serious threat to children.

Following a regular vaccination schedule to immunize your child can protect them and others from diseases including:

- Diphtheria
- Hepatitis A
- · Hepatitis B
- Hib disease (Haemophilus influenza type b)
- Influenza (Flu)
- Measles

- Mumps
- · Pertussis (Whooping Cough)
- Pneumococcal Disease
- Polio
- · Rubella (German Measles)
- Tetanus (Lockjaw)
- Varicella (Chickenpox)

Talk with your child's doctor about recommended immunizations.







Source: Centers for Disease Control and Prevention

Follow us @MUSTbenefits

bcbsmt.com

Blue Cross and Blue Shield of Montana, a Division of Health Care Service Corporation, a Mutual Legal Reserve Company, an Independent Licensee of the Blue Cross and Blue Shield Association

mustbenefits.org

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