

MONTANA ASSOCIATION OF SCHOOL BUSINESS OFFICIALS MARCH 2017

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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MTSUIP/MTSBA/MASBO HOT TOPIC EMPLOYMENT SEMINAR in Helena

April 18, 2017

8:30 a.m. - 4:00 p.m.

Montana School Boards Association
863 Great Northern Blvd.
4th Floor Conference Room

Send your custodian, kitchen and transportation supervisors, athletic directors, principals, superintendents, business officials and trustees to this important training covering:

- Title 2 Benefits
- Criminal Background Checks
- Spring Hiring Decisions
- Non-Discriminatory Employment Practices

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. To register, click [here](#).



ASSISTANCE FOR BUSINESS CLINIC

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.

This is good training for your human resources and payroll staff!

Click [here](#) to see the schedule and fees.

Click [here](#) to register.

MSCPAs HOSTS 2017 GOVERNMENTAL ROUNDTABLE AND GAAFR CONFERENCE

The Montana Society of CPAs' Governmental Audit, Accounting & Financial Reporting Committee offers a conference designed for auditors of local governments, representatives of city, county and district governing boards, and accountants from city, county and school district business offices.

Hilton Garden Inn - Bozeman

To register, click [here](#) or call 406-442-7301

Governmental Roundtable – May 18

10:00 am – 3:00 pm 5 hours CPE credit

This year's discussion will have information from the MT Department of Administration on reporting problems trends, the MT Board of Investments, a legislative update and an update from OPI. You will be able to bring your own ideas for discussion.

GAAFR Conference - May 19

8:00 am – 4:00 pm 8 hours CPE credit

Speaker Wes Galloway will provide an in-depth look at all of the recent and forthcoming GASB guidance, and look over the horizon at future accounting changes, including potential changes to the governmental reporting model.



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MASBO Board of Directors

President	Tammy Tulberg, Target Range Schools	Region 1 Director	Noreen Anderson, Hellgate K-8 School
Vice-President	Cindy Foley, West Valley Schools	Region 2 Director	Belinda Klick, Sun River Valley Schools
Past President	Mike Arnold, Billings Schools	Region 3 Director	Rhonda Opp, Medicine Lake Schools
Fiscal Agent	Kim Aarstad, East Helena Schools	Region 4 Director	Lorie Carey, Jefferson Co. High School
Ex-Officio, MTSUIP	Denise Williams	Region 5 Director	Rita Huck, Huntley Project Schools
Ex-Officio, OPI	Kara Sperle	Region 6 Director	Jen Mettler, Baker Schools

MASBO SUMMER CONFERENCE & NEW CLERK ACADEMY — JUNE 12-16 at FAIRMONT HOT SPRINGS

“OWN IT!” is the theme for the MASBO Summer Conference. Conference week kicks off with the New Clerk Academy on June 12, a special schedule for June 13 and even more sessions on June 14. Summer Conference starts on Wednesday, June 14 and runs through 1:00 on Friday, June 16. 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, 2017. 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, 2017, 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 his or 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 2017 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.



HAPPY SPRING!



MASBO P-CARD PURCHASES REPORT

P-Card purchases for eleven months of the rebate year (April – February) totaled just under **\$16.8 million** with **120** school districts and special education cooperatives participating in the program. At the same time last year, we had 104 participants with \$14.3 million in total purchases.

Click [here](#) to see the current year P-Card purchases report. And, for those of you who are monitoring your purchasing totals, click [here](#) to see a comparison of February 2017 vs. February 2016.

NEW MASBO LOGOWEAR AVAILABLE!

Click [here](#) to see the latest selection of MASBO logowear now available to order online. Choices include:

- Short sleeve polo
- Long sleeve polo
- Long sleeve easy care dress shirt
- Soft shell vest

Questions? Contact Marie Roach at mroach@masbo.com or 406-461-8804



For every action, there is an equal and opposite reaction, plus a social media overreaction.

HANDY RESOURCES

Projecting General Fund Reserves

This handy spreadsheet that will help you:

- ✓ Project ending general fund balance based on actual and projected revenue and expenditures during the year.
- ✓ Project operating reserves, excess reserves and fund balance reappropriated for the ensuing year’s budget.
- ✓ Determine the level of reserves necessary to maintain a positive cash balance in the ensuing year.

Click [here](#) or go to the [OPI website](#) and click on the Finance & Grants tab, then School Finance, then Budgeting Spreadsheets/Worksheets tab, then Projecting General Fund Reserves Spreadsheet.

State Payments to Schools and Cooperatives

OPI posts an electronic [Payment Advice](#) 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 FY2016-2017. 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 ENDORSES THESE PROGRAMS

	<p>Workers Compensation Insurance Shawn Bubb, Director of Insurance Services 406-457-4500 sbubb@mtsba.org http://www.msgia.org/home</p>
	<p>Health, Dental, Vision, Life & Long-Term Disability Benefits Andy Holmlund, Chief Executive Officer 406-457-4400 aholmlund@ms-sf.org http://mustbenefits.org/</p>
	<p>Healthcare Reform Section 125 Services Health Savings Account Services Cheryl Brandt, State Manager 877-589-2544, ext. 353 Cheryl.Brandt@americanfidelity.com http://www.americanfidelity.com/home.aspx</p>
	<p>Montana Schools Property & Liability Insurance Plan Dave Pillatzke, Program Manager 406-457-4531 dpillatzke@paynewest.com http://msplip.com/</p>
	<p>Unemployment Insurance Program Theresia LeSueur, Director 406-457-4407 tlesueur@mtsba.org http://www.mtsuip.org/</p>

IMPORTANT DATES & DEADLINES — APRIL 2017

MARCH 23 – APRIL 22

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 3

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).

NOTE: Between March 5 and April 2, 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.

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 13-2-301](#)

[MCA 13-2-301](#)

[MCA 20-20-204](#)

Sample form: [Notice of Close of Regular Registration](#)

[MCA 20-20-312](#)

IMPORTANT DATES & DEADLINES — APRIL 2017

APRIL 3 (continued)

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)
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APRIL 4

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 21, 2017). 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
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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 FY2016-2017 Reimbursement Rates
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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
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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. Sub-groups 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 21, 2017 (Test Window Count Date) and must be completed by April 11, 2017.	AIM Collection Schedule AIM Program Participation Collection Guide
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IMPORTANT DATES & DEADLINES — APRIL 2017

APRIL 12

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 any 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 12 – APRIL 17

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 21

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

[FY2017 Payment Schedule](#)
[State Payments to School and Cooperatives](#)

APRIL 25

Grant cash request due to OPI

Grant cash requests made by this date will be paid on May 10.

[OPI Grants Calendar](#)

IMPORTANT DATES & DEADLINES — APRIL 2017

APRIL 28		
<p>Carl D. Perkins 'Intent to Apply' AND State CTE/VoEd Funding Applications due</p>	<p>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.</p> <p>Authorized representatives of Local Education Agencies (LEAs) will use the online link to access and complete the brief electronic form for the 2017-2018 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 2017-2018 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.</p>	<p>Online link to Application</p> <p>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.</p>
<p>CTE Spring Data Collection due</p>	<p>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.</p>	<p>CTE Quick Reference Guide CTE Tips & Tricks</p>
APRIL 30		
<p>Form 941 for Quarter 1 is due</p>	<p>Form 941 payroll report for Quarter 1 (January, February and March) is due.</p>	<p>Form 941 Form 941 Instructions</p>
<p>Indirect Cost Applications for FY2018 grants are due to OPI</p>	<p>Application forms to request an indirect cost rate for fiscal year 2018 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.</p> <p>For compatibility with the E-grants system the closing date for applying for an Indirect Cost Rate is April 30.</p>	<p>Indirect Cost Cover Letter Indirect Cost Rate Materials</p>

DON'T FORGET TO CHECK OUT OPI'S MONTHLY SUMMARY OF ACTIVITIES

Keep up with what's going on at the Office of Public Instruction by checking the Monthly Summary of Activities located on the Superintendent's Office page. Click [here](#) for more information.

FROM OUR EXHIBITOR MEMBERS

Intermountain Building Operators Association (IBOA)

Join us on April 11 in Helena at the next BOC Level I class for building operators and facility managers in Montana. At this class, those with careers in building operation and maintenance who wish to broaden their knowledge of the total building system will have the opportunity to learn more about the energy efficient operation of building HVAC systems.

When: Tuesday, April 11, 2017

Where: Holiday Inn Express & Suites, 3170 North Sanders Street in Helena

For more information or to sign up for the April 11th class, contact Clarence Wieting at iboa@intboa.org

American Fidelity Assurance Company – Update on Affordable Care Act

GOP Leadership Pulls Repeal-and-Replace Measure

- **What Happened?**

Facing near-certain failure in the House of Representatives Friday, House Speaker Paul Ryan pulled the American Health Care Act (AHCA) from consideration. This move comes after several days of negotiating over the bill's final language failed to produce a consensus in the Republican Party.

- **What's Next?**

The Republican majority may go back to the drawing board, propose new or amended legislation, or could set aside the issue of health care reform for the time being to focus on other legislative priorities (such as tax reform). Some members of Republican leadership, most notably President Trump, have indicated a strong desire to move forward with other key elements of the party's legislative agenda.

- **What Should Employers Do?**

For now, the Patient Protection and Affordable Care Act (ACA) remains the law, and employers should continue current compliance efforts while watching for changes.

- **Stay Informed**

American Fidelity remains committed to keeping our customers up-to-date on legislative developments. If you need assistance planning your employee benefits strategy, contact your American Fidelity representative or email HCR@americanfidelity.com.



WHO SHOULD BE THE NEXT MONTANA TEACHER OF THE YEAR?

To honor our state's outstanding public school teachers, the Montana Professional Teaching Foundation annually recognizes three teachers through the Montana Teacher of the Year Program and chooses one to be the Montana Teacher of the Year.

The Montana Teacher of the Year becomes our state's candidate for the National Teacher of the Year, receives a cash award, a sculpture of Montana and other recognitions including a personal meeting with the President of the United States. The Montana Teacher of the Year will serve for one year as an advocate for the teaching profession across Montana.

Qualifications: Full time classroom teacher or specialist with 5 years or more of experience. Nominations may come from a teacher, classified school employee, administrator, trustee, local teacher association, student or parent.

To Nominate a Teacher:

Provide name, home address, school where the nominee works, phone number(s), email address and a brief paragraph or two about the nominee. Also name and phone number of the person nominating. Mail nomination(s) to Montana Teacher of the Year, 1232 E. 6th, Helena, MT 59601 or email nomination to dgraveley@mea-mft.org.

Nomination deadline is May 1, 2017.

Teacher-completed applications are due July 7, 2017.

MASBO EXHIBITOR MEMBERS

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Schoolhouse IT Jeffrey Patterson jeffp@schoolhouseit.com	Montana Unified School Trust Andy Holmlund aholmlund@ms-sf.org	Pine Cove Consulting Brandon Bassett bbassett@pinecc.com
Horace Mann Keith Jorgensen keith.jorgensen@horacemann.com	Infinite Campus Stephanie Sondrol Stephanie.sondrol@infinitecampus.com	Klimas Financial Services, Inc. Charles Klimas cklimas@gwnsecurities.com
Montana Schools Property & Liability Insurance Plan (MSPLIP) Dave Pillatzke dpillatzke@paynewest.com	Stifel Nicolaus Bryan Stelmack yroybal@stifel.com	MSGIA-WCRRP Shawn Bubb sbubb@mstba.org
Southwest MT School Services Bruce Grubbs bgrubbs@swmss.ccsend.com		School Specialty Scott Wilkey scott.wilkey@schoolspecialty.com

Make drug safety a habit



Following doctor's orders is the best medicine

Not taking medicine as the doctor has prescribed can get in the way of healing and can lead to more problems with an illness. To stay on track with your medication, here are some useful tips:

- Know the names of all the medicines you take and what each is used for.
- Make sure you know how to use your medication correctly and how long you will need to take it.
- If you are having problems with the drugs you're taking, talk to your doctor.
- Keep a record of the drugs you take and when and how often you take them. Give this list to a friend or loved one in case of an emergency.
- Read all labels and follow directions.
 - Make taking your medicines a habit. Take them at the same time along with other daily activities, such as when you brush your teeth or at mealtimes.
 - Make sure all your doctors know about all the medicines you take.



Don't share prescription drugs with anyone else. Store your medicines in a place where you'll see them, but make sure they're secure when you have guests. And make sure you throw away any drugs when they are no longer needed.



BlueCross BlueShield
of Montana



www.mustbenefits.org

Source: U.S. Food and Drug Administration

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