

MONTANA ASSOCIATION OF SCHOOL BUSINESS OFFICIALS

MAY 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

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MASBO SUMMER CONFERENCE & NEW CLERK ACADEMY JUNE 12 -16, 2017 at FAIRMONT HOT SPRINGS, ANACONDA

As usual, change is coming our way. Legislative changes at the federal and state level, staff changes and other challenges bring about stress and anxiety. Summer conference is a time to embrace the uncertainty of change by learning from the experts and networking with your peers. It's a time for both reflection and FUN, so that when you return home, you'll be ready to



TRAINING SCHEDULE-AT-A-GLANCE

[Click [here](#) for schedule and session descriptions]

MONDAY, JUNE 12

New Clerk Academy

WEDNESDAY, JUNE 14

General Fund Budget Calculations II (3 hours)
TFS Spreadsheets & Data I (2 hours)
Payroll for New Clerks
MSPLIP: Is Your School Ready for a DLI Inspection?
Accessing MTSBA Membership Resources
Certification Program & Test Preparation (3 hours)
Funding for Special Education Cooperatives
Long Term Care Matters: Know Your Options
MASBO P-Card Tips & Tricks

THURSDAY, JUNE 15

TFS Spreadsheets & Data I (2 hours)
Excel Combo Platter (2 hours)
Montana Medicaid (2 hours)
Tuition Fund Levy for Special Education
BMO Spend Dynamics
MSPLIP: Is Your School Ready for a DLI Inspection?
TRS Legislative Update & Reporting Issues
MSGIA/WCRRP: Enhancing Staff Training
Infinite Campus: Using FRAM
Infinite Campus: Fees Management
MSPLIP: Dave's Top Ten
MPERA: Update on ERIC system

FRIDAY, JUNE 16

School Law Update

TUESDAY, JUNE 13

Software User Group Meetings
E-Grants Basics for New Clerks
General Fund Budget Calculations I (3 hours)

MSGIA/WCRRP: Workers Comp Reporting Made Easy
MUST Value Adds
DCA and Free/Reduced Price Applications
The 3 Cs of Workforce Management
MT Student Data System: AIM
School Facilities Financing Overview
MPERA: Update on ERIC System
School Nutrition MAPS
OPI Potpourri

Round Table Discussions (2 hours)
QPR Gatekeeper Training (2 hours)
Cost Management Solutions for Rising Health Care Costs
School Nutrition MAPS
MUST: The WHY Behind the Rising Cost of Health Insurance
Essential Oils Class for Beginners
Foxie Lady Users Meeting
Black Mountain Software DYK Session
Infinite Campus: Ad Hoc Series I
Health Care Reform & How to Plan for the Future
Security Awareness
Increasing Revenue Through School Meals

OPI 2017 Legislative Update

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 VICE-PRESIDENT

Have you got it in you for **one** more election? We have THREE candidates for MASBO Vice-President this year! After accepting nominations from the floor during Wednesday's Opening Session at the summer conference, all active members in attendance will have a chance to vote for our next MASBO VP. I invited all three nominees to submit a brief write-up for this newsletter. Here they are, in alphabetical order:

Lorie Carey – Jefferson High School



Hello fellow MASBO members!! This is Lorie Carey and I hope to be able to serve you as MASBO's next vice-president. At this coming MASBO summer conference you will have the chance to choose a vice-president for the board. The wonderful aspect of this election is that it will be nothing like our state's recent races for positions!! What you will have are three willing, capable candidates who wish to serve the MASBO members of Montana.

In the fall of 2003, I joined the staff at Jefferson High School and Boulder Elementary and have been a MASBO member since that time, 13.5 years. I have learned so much serving as the region 4 director for the past four years and have been able to get to know many of you so much better. At the suggestion of a couple MASBO members, I carefully considered running for vice-president and decided that this would be a natural progression of service to the association. Serving people is my greatest joy, as I imagine it is for most of you. When asked to share my greatest leadership characteristic, I would have to say that *leading by doing* has been the most effective for me. One of the primary duties of the vice-chair is to manage the mentorship program. Although I have never been an official mentor through the program, I have routinely assisted 5-7 business managers. Helping them is so rewarding. I would encourage all of you to consider serving the association by volunteering to serve on a MASBO committee, running for a director position, or running for a board leadership position. Together with Denise and Marie, we can continue the wonderful work of the MASBO organization. Thanks to all of you for serving Montana schools and students.

Jane Knudsen – Malta Schools



Greetings! My name is Jane Knudsen. I am the Business Manager/District Clerk for the Malta School District. I have been a member of MASBO since coming to work for the District in 2010. At the time, I did not understand the importance of this organization. As the years have passed, I have witnessed how well MASBO supports its membership. From the variety of workshops to the annual conference, MASBO keeps the membership informed, trained and ready to tackle the ever-changing landscape of our job. It is for those reasons I wanted to run for Vice President. When I started, I was the new clerk in my county. By the end of the next year, I was the second longest clerk. Within five years, I was the longest serving clerk. Think about that – five short years is all it took to move from new to old. The people who mentored me have moved on and now I hope to fill that role. Could I have done that without MASBO? Perhaps, but not as well.

I want to be able to give back to the organization that has nurtured me from a green rookie to a seasoned veteran. My goal is to assist other clerks as they take on this position. As we realize, it can be scary and overwhelming. Our goal as an association should be to train, mentor and lead the less experienced until they become the trainers for their peers. This job is more than a job – it is about the relationships that you build throughout the state with other clerks, the students in the school, and the people who work for the school. It is you.

I struggled with the question of describing my greatest leadership characteristic. People do not generally think of themselves in leadership terms. I asked people around our school for one word that they associate with leaders. The responses I received included integrity, honesty and dependability. Those are the exact characteristics that I would want people to describe me with, and the very characteristics I will bring to the Vice Presidency.

To close, I will leave you with this thought: a couple of years ago as I read through the salary survey information, I came across someone who wrote that their favorite perk of the job was getting to see the kindergarteners every day. That has stuck with me. Yep - this is a pretty good gig to have!

Laurie Noonkester – Lockwood Schools



Hello Fantastic Fellow Business Officials! I am Laurie Noonkester, Business Manager/District Clerk for Lockwood School District in Billings. I have been a member of MASBO for the last 9 years and found myself saying “Yes” to the gracious nomination of MASBO Vice-President. I know it sounds very cliché, but heck...what an honor it would be to serve you, the members of MASBO.

Admittedly, I am stepping way out of my comfort zone with this nomination as I am neither an eloquent public speaker nor especially comfortable in any spotlight. I do however, feel that it is time to put my comfort and shortcomings aside and give back to the organization that has taught, supported and helped me grow in this ever evolving career. Quite honestly, I would not be in this job today without MASBO and its fabulous membership resources. When someone, somewhere, comes up with brilliant plans to make educational finance or employer reporting “better”, I have counted on MASBO to help me make sense, plan and develop a strategy to tackle their brilliance in my everyday work. It is simply time for me to give back.

When asked to describe my greatest leadership skills, I came up blank!

Upon further evaluation, I fell back on my greatest accomplishments...my family!

My blessing came with two older boys when I married my husband Grant, the four children we had together and finally the one we added to our brood when he was 1 ½. Our kids are all still alive despite their tendency to tempt my laws of safety and are even productive members of this great country. So you could say I have organization and follow through skills.

Then, I told these very children that I was canceling family dinners until they gave me grandbabies. I now have 16 grandchildren (shhh...#17 is on its way but not everybody knows yet.) So, I would count that as successful negotiating and problem solving skills. 16 Grandchildren...I remember their names and will argue their right to be spoiled rotten. There you have my keen mental recall and undying loyalty.

I would sincerely consider it an honor to be your MASBO Vice President should you have me.

May many of life’s blessings find you all!

~Laurie~

MORE ON THE 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 who have incurred extensive medical bills due to illness. Please consider bringing a theme basket or other item for the silent auction with you to the conference (cash donations are accepted, too). This year’s recipient is Peggy Tobin of Sunburst Schools.

- **PHOTOS FOR NAME BADGES AND MEMBERSHIP DIRECTORY**

Bring your smile! Lifetouch National School Studios has again generously offered to have photographers on hand near the registration table to take a quick picture for your conference name badge and they’ll also give MASBO a CD with all the photographs so we can include them in our membership directory. Thanks, Lifetouch!

- **THURSDAY NIGHT POOL PARTY AND DINNER**

By end of day on Thursday, you will likely have a full brain. Meet us out on the pavilion for a western-style barbeque (think hamburgers and hot dogs) followed by a pool party, dancing and karaoke with music by Scott Williams. Bring your best swimwear and gear: bathing suit, flip-flops, sarong, sunglasses, cover-up, beach ball, goggles, etc. Dinner and entertainment sponsored by Montana Schools Property & Liability Insurance Program (MSPLIP).



CERTIFICATION PROGRAM

Certification Test Preparation will be available at the Summer Conference. Plan to attend a 3-hour session on **Wednesday, June 14** at 8:30 a.m. where you'll hear an overview of certification program and then brush up on topics covered in Test #1. Certification Committee members will cover the following subject areas: Board Meetings & Minutes, Elections, Payroll and Pupil Transportation. For those who have made the proper application to begin the testing process (or need to re-test), Test #1 will be given at 3:00 on Wednesday afternoon.

Certification Committee Members are:

- ★ **Donnie McVee** (Laurel), Chair
- ★ **Kathy Preeshl** (North Star)
- ★ **Nicki Beyer** (Sidney)
- ★ **Sandy Watkins** (Geyser)
- ★ **Kelly Doornek** (Glasgow)

TOP TEN REASONS TO GET YOUR MCSBO

#9 Maintains High Standards and Ethics:

As a Montana Certified School Business Official you will become one of an elite group of school clerks who have demonstrated their knowledge of all aspects of this multi-faceted job – one that requires high standards of job performance and adherence to ethics expected of school business officials. Your certification tells your trustees, administrators, staff, students, community and auditor that you are a proven exceptional performer. Your camaraderie with other clerks of your status will allow you to confer on complex issues that ensure you're operating under and maintaining the highest of ethical standards.



Nearly all of Montana's school districts are members of the Montana School Boards Association (MTSBA) and we represent nearly 1,500 elected trustees. MTSBA provides a comprehensive range of professional services to Montana's public schools. Now that your elections are complete, here are several tips for preparing your newly-elected trustees for their upcoming service - we know it can be a daunting experience for them.

Following your organizational meeting, notify MTSBA of changes to the board composition. Here's how:

- Log into mtsba.org. If it's been a while since your last log in, your username is your email address. If you do not know your password, please click on "Reset Password" and follow the prompts.
- Click on eMEMBERSHIP, in the menu at the top of the page and login to the membership database (same login for mtsba.org).
 - Inactivate trustees who are no longer serving on your local school board.
 - Add newly-elected trustees. Please include their address, phone, and email. This information is crucial to provide them access to the services and resources available to them as a member of MTSBA.
 - Identify the board chair and vice chair of your local school board.



Call us at (406) 442-2180 if you have any questions while making these changes.

At mtsba.org/new-trustees you and your newly-elected trustees will find most everything they need to help them succeed in their new role as an elected official.

Coordinate with your district's leadership team to attend MTSBA's **Leadership Symposium in Helena on Friday, June 9**. This training is offered at no-charge as a MTSBA member benefit and is a great way to get your district's new trustees up-to-speed.

Be assured that MTSBA never sells or otherwise provides your information to third parties and strictly controls the use of database information to contact you. We're here to assist you and your leadership team to address the fundamentals of education leadership to meet the needs of each child in your district. Thank you for taking time out of your busy schedule to update your district's information. Please don't hesitate to call if you have any questions.

MASBO ENDORSES THESE PROGRAMS

	<p>Healthcare Reform Section 125 Services Health Savings Account Services Angie Newman, State Manager II 877-589-2544, ext. 352 angie.newman@americanfidelity.com http://www.americanfidelity.com/home.aspx</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>Workers Compensation Insurance Shawn Bubb, Director of Insurance Services 406-457-4500 sbubb@mtsba.org http://www.msgia.org/home</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 Theresa LeSueur, Director 406-457-4407 tlesueur@mtsba.org http://www.mtsuip.org/</p>

IMPORTANT DATES & DEADLINES – JUNE 2017

JUNE 1

Last day to amend grants	<p>Last day to request grant amendments (budget and program modifications) for projects that will end June 30.</p> <ul style="list-style-type: none"> • ABLE Extension • ABLE, EL Civics • State ABLE • ACT Plus Writing (Gear-Up) • Carl Perkins and Technical Education • Title IV, 21st Century Community Learning Centers • Indian Education for All • In-State Facilities: Significant Needs • Pre-School Development Grant 	OPI State & Federal Grants Handbook
Last day to file OPI Form PAA-3 Application for Additional ANB	<p>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.</p> <p>Trustees apply to Superintendent of Public Instruction for approval of increase in ANB (PAA-3) due to unusual enrollment increase when enrollment is expected to increase more than 4 percent ("anticipated enrollment increase"). OPI must act by fourth Monday in June.</p>	MCA 20-9-313 MCA 20-9-314 Form PAA-3
Deadline for trustees to request county election administrator to conduct school elections for next fiscal year	<p>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.</p>	MCA 20-20-417 Trustee Resolution – Request for County to Conduct Elections Click on Basic Election Forms Click on Board of Trustees tab
County Superintendent electronically authorizes second semester transportation claims	<p>County Superintendent electronically authorizes second semester transportation claims (consisting of one copy of each district claim).</p>	MCA 20-10-145(2) A.R.M. 10-7-104(1)(b)

JUNE 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 Click on Meal Counting and Claiming
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
JUNE 15		
District of residence pays remaining tuition and transportation obligation	By December 31 of the school fiscal year following the year of attendance, the district of residence shall pay at least one-half of any tuition and transportation obligation established under subsection (5)(a)(i) out of the money realized to date from the district tuition or transportation fund levy. <i>The remaining tuition and transportation obligation must be paid by June 15 of the school fiscal year following the year of attendance.</i>	MCA 20-5-324(5)(a)(ii)
JUNE 20		
Grant cash request due to OPI for payment on June 23	Grant cash requests submitted from May 26 through June 20 will be processed and paid on June 23 . There are no payments in the month of July. The next grant payment will be made on August 10.	OPI State & Federal Grants Handbook
JUNE 29		
OPI makes K-12 BASE aid payments and Pupil Transportation 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 (D4A) Data for Achievement (NRD) Natural Resource Development (TRAN) Transportation Payments	FY2017 Payment Schedule State Payments to School and Cooperatives

JUNE 30		
Last day of fiscal year	<p>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.</p> <p>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.</p>	<p>MCA 20-1-301 MCA 20-9-209</p> <p>A.R.M. 10.10.101</p>
Last day to obligate funds for projects ending June 30	<p>Last day to obligate funds for projects ending June 30.</p> <p><u>Federal Programs</u></p> <ul style="list-style-type: none"> • Adult Basic and Literacy Education • Carl Perkins • IDEA Part B, Students with Disabilities • IDEA Preschool • ESEA Title IV, Part B, 21st Century Community Learning Centers <p><u>State Programs</u></p> <ul style="list-style-type: none"> • Gifted and Talented • Indian Education for All (various grants, depending on year) • Services for Significant Needs Students (formerly Day Treatment) • State Adult Education 	<p>OPI State & Federal Grants Handbook</p>
FY 2016 regular audits are due to OPI	<p>FY 2016 regular (non-Federal) audits are due to OPI by June 30, 2017, for entities with federal expenditures less than \$750,000 and revenues greater than \$500,000.</p> <p>Entities that had revenues less than \$500,000 are required to have a Financial Review once every four years. If your district is required to have a Financial Review for FY2016, the report is due to OPI by June 30, 2017.</p> <p>Please remit audit reports and correspondence to OPIAuditReports@mt.gov.</p> <p>For more information, contact Kathleen Wanner, 406-444-9852</p>	<p>MCA 20-7-503 OPI School Finance website - Auditing</p> <p>A.R.M. 2-4-410</p> <p>OPI School Finance Division website – Auditing</p>
Last day trustees may adopt a budget amendment	<p>Board of Trustees may adopt a resolution for a budget amendment due to causes other than an unusual enrollment increase.</p>	<p>MCA 20-9-162 A.R.M. 10.22.201(4) Budget Amendment Packet</p>

MASBO EXHIBITOR MEMBERS

Insurance Management Services of Montana (IMS) John R Boyer john@imsvest.com	Intermountain Building Operators Association (IBOA) Clarence Wieting iboa@intBOA.org	MSGIA-WCRRP Shawn Bubb sbubb@mstba.org
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Don't skimp on sleep



You have so much to do and so little time to do it. Naturally, you have to find a way to accomplish it all. Do you steal sleep time, thinking one less hour won't hurt you? Think again!

Cutting back on sleep — even one hour — can make it hard to concentrate and slows your response time. When you slack on sleep, your judgment is impaired. This can result in lower performance at work and an increased risk for dangerous situations like car accidents.

Health problems linked to lack of sleep

Skimping on sleep is never a wise decision. Insufficient sleep has been linked to chronic diseases and conditions including diabetes, cardiovascular disease, obesity and depression. Short-changing sleep also negatively impacts your immune system, mood, alertness and the way you think.

The National Sleep Foundation found that 39 percent of American adults get less than seven hours of sleep each night — well below the seven to nine hours recommended by sleep experts. The amount of sleep you get is as important as the quality of your sleep, which should be continuous and without interruptions. You need to have continuous sleep so you'll feel refreshed and alert for the day ahead.

Flip the page to learn more reasons why you need a good night's sleep.



BlueCross BlueShield
of Montana



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

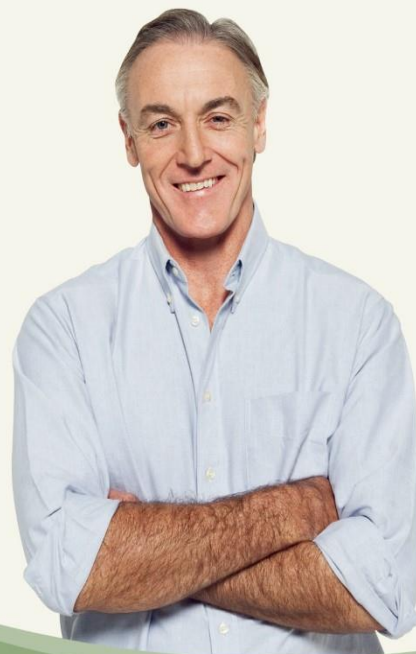
bcbsmt.com

Lack of sleep takes its toll



Sleep provides the body and the brain with many benefits. Not sleeping enough has serious side effects. Here are six reasons why you should make sure that you are getting enough sleep:

1. **Learning and memory** – Sleep helps the brain commit new information to memory. Research shows that people who sleep after learning and doing mentally challenging tasks do better on tests later.
2. **Metabolism and weight** – Hormones released during sleep affect how the body uses energy. Chronic sleep deprivation may cause weight gain and affect your appetite.
3. **Safety** – Too little sleep contributes to a greater tendency to fall asleep during the daytime for split seconds, causing falls, mistakes and accidents.
4. **Mood** – Lack of sleep can make you irritable, impatient, moody, depressed and unable to concentrate.
5. **Cardiovascular health** – Continued sleep deprivation has been linked to high blood pressure, increased stress hormone levels and irregular heartbeat.
6. **Disease** – Not getting enough sleep alters your immune system. During sleep your body produces hormones that fight infections and repair cells and tissues. If you aren't sleeping as much as you should, you may be more likely to develop chronic diseases and other medical conditions.



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