



**EMPOWERED BY KNOWLEDGE. STRENGTHENED BY
COMMUNITY**

Program Guide

Updated for Cohorts: Class of 2027 & Class of 2028

Stepping into the role of a School Business Official can be overwhelming, but we are here for you! Our refreshed New SBO Academy is a two-year professional development program designed to support new SBOs with the tools, training, and community you need to thrive.

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INCLUDED FORMS

- New SBO Academy Registration Supplemental Form and Participation Agreement

To join the New SBO Academy, please review this guide then complete the enclosed forms and finish your registration on the MASBO website (New SBO Academy Registration).

Questions or Support

Registration Help: Marie Roach
mroach@masbo.com
(406) 461-8804

Program Questions: Shay Baize
sbaize@masbo.com
(406) 431-0124

ACADEMY DETAILS

The New SBO Academy is a two-year professional development program for School Business Officials (SBOs) that currently hold an active MASBO membership. Participating SBOs will have access to their own online community, attend quarterly training sessions, gain exposure to best practices in school finance and build a network of peers. Upon successful completion of the academy, graduates receive a New SBO Academy certificate and special recognition at our summer conference.

The New SBO Academy will help ensure Montana's newest SBOs are fully equipped to manage district finances with confidence, accuracy, and strategic insight. The program will also build a community for New SBOs and provide validation for their commitment to the field and professional development.

PROGRAM HIGHLIGHTS

- **Cohort Community:** By grouping new SBOs into cohorts, we build an immediate network of peers facing the same challenges, and foster lasting relationships that extend beyond training sessions.
- **Dedicated Support System:** Quarterly New SBO Academy workshops are paired with ongoing discussion groups and an online discussion forum, so participants never have to "figure it out" alone.
- **Shared Resources & Best Practices:** Through training sessions and the online community, SBOs learn from each other's successes and missteps, reducing trial-by-error and accelerating confidence.
- **Professional recognition:** Graduates receive a New SBO Academy certificate and are recognized at the MASBO Summer Conference.

PROGRAM PERKS

- 30+ hours of in-person, virtual, and/or recorded training (limited to quarterly New SBO training sessions only).
- Online Academy community through the New SBO Academy Forum.
- New SBO Academy swag at the MASBO Summer Conference.
- Graduation recognition at the MASBO Summer Conference at the conclusion of Year 2.

STRUCTURE

The New SBO Academy is delivered through quarterly New SBO training sessions (in-person, virtual, and/or recorded) and supported by an online forum for peer-to-peer learning and MASBO staff support.

Program year (July - June)

The New SBO Academy runs on a July 1 to June 30 program year. For members enrolled in the full Academy, forum access begins July 1. The first included quarterly New SBO training session is typically held in September.

SCHEDULE & INCLUDED TRAINING SESSIONS

Below is a typical cohort's 2 year training schedule for the full Academy. Any MASBO training sessions outside of the 4 New SBO Quarterly training sessions are **not** included in Academy tuition.

Event/ Included Training	1st Year	2nd Year
July 1st	Academy begins & forum access opens	Academy 2nd year begins & forum access continues
Fall New SBO Training (typically September)	In Person Training Session free for Academy members	In Person Training Session free for Academy members
Winter New SBO Training (typically January)	Virtual Training Session free for Academy members	Virtual Training Session free for Academy members
Spring New SBO Training (typically April)	Virtual Training Session free for Academy members	Virtual Training Session free for Academy members
Summer New SBO Training (Pre-Conference)	In Person Training Session free for Academy members	In Person Training Session free for Academy members
Software User Groups (Pre-Conference)	Free Pre-Conference In Person Training Session	Free Pre-Conference In Person Training Session

Academy members are also highly encouraged to attend the MASBO Summer Conference each year. Summer Conference registration is **not** included in Academy tuition.

New SBO quarterly training sessions offered prior to an Academy member's registration date are available on the MASBO Learning Hub for purchase. These trainings are also highly recommended for Pre-Academy Bridge participants. (More information the Pre-Academy Bridge program can be found on page 6)

Additional trainings on a number of topics are available, and highly encouraged, but must be purchased individually.

ONLINE COMMUNITY & FORUM

The New SBO Academy Forum is the Academy's online community space. It supports ongoing discussion, questions and answers, and sharing of resources between New SBO quarterly training sessions.

Single forum for all Academy members

The Academy uses one shared forum for all members until graduation. This structure helps second-year members gain confidence by supporting first-year members, and it strengthens statewide collaboration.

Forum access and opt-out

- Forum access begins July 1 for full Academy participants. Pre-Academy Bridge participants receive early access upon Bridge enrollment.
- Forum access ends upon graduation from the program.
- Opt-out option is available on the MASBO website at any time. Opting out does not change Academy tuition and does not create eligibility for a partial refund.

Temporary platform during website transition

Until the new MASBO website is launched, the Academy forum is being hosted as a "Class of 2027" Google Group. Once the MASBO website launches, all Academy members will be moved to the dedicated New SBO Academy forum on the MASBO website and the Google Group will no longer be used.

Members of the Class of 2027 Google Group will retain access to past Google Group conversations until June 30, 2027, but are asked to discontinue posting to the Google Group as soon as the MASBO website forum is launched.

PROGRAM ELIGIBILITY

- Active MASBO membership is required to participate in the New SBO Academy.
- Participants are expected to attend scheduled trainings and engage with the cohort community throughout the two-year program.
- Participants agree to uphold professional standards, including the expectations outlined in the MASBO Ethics Manual.

PRE-ACADEMY BRIDGE PROGRAM

MASBO offers the Pre-Academy Bridge Program, a structured on-ramp to the Academy experience for eligible members who register for the Class of 2028 between January 17, 2026 and June 30, 2026.

Pre-Academy Bridge includes:

- Immediate access to the Academy Forum, providing direct connection to cohort peers and MASBO staff.
- Registration for the Spring and Summer quarterly New SBO training sessions prior to the official Class of 2028 start date.
- On-demand access to recordings from two prior New SBO Fall and Winter training sessions (individually purchased through the MASBO Learning Hub), allowing you to build foundational knowledge at your own pace.
- Priority access to Class of 2028 Academy registration.

Pre-Academy Bridge participants graduate with their cohort and still receive the full two-year Academy experience.

REGISTRATION TIMING & COHORT PLACEMENT

Cohort placement for the full Academy is based on the date you register. The dates below reflect the transition from the Class of 2027 to the Class of 2028.

Registration Date	Cohort	Includes	Notes
July 1, 2025 - Jan 16, 2026	Class of 2027	Full year of program perks & support	Registration closes Jan 16, 2026 (last day of the scheduled winter quarterly New SBO webinar).
January 17 - June, 30, 2026	Class of 2028	Option to enroll in the Pre-Academy Bridge Program OR wait until July 1 st for forum access	Class of 2028 officially opens July 1, 2026. Fall and Winter webinar recordings may be purchased individually in the MASBO Learning Hub.
July 1, 2026 - Last Day of the 2027 Winter New SBO Training	Class of 2028	Full year of program perks & support	

Any full Academy registrations placed between Jan 16, 2026 and the last day of the 2027 Winter New SBO training session will be placed into the Class of 2028.

QUICK DECISION GUIDE

1. If you register on or before Jan 16, 2026, you are registering for the Class of 2027.
2. If you register after Jan 16, 2026, you are registering for the Class of 2028.
3. If you register for the Class of 2028 between Jan 17, 2026 and Jun 30, 2026, you may also enroll in the Pre-Academy Bridge Program.

CERTIFICATION & RECOGNITION

Each year we will have a graduating class recognized at the MASBO Summer Conference, with the first class graduating in June 2027. This recognition will include: a Certificate of Achievement, "Academy Graduate" swag and digital badge, public recognition at Summer Conference, Summer Conference Photo Ops and a MASBO drafted Press Release sent to your Supt and Board.

TUITION

Annual Academy tuition is set by MASBO and is not adjustable or prorated. Tuition levels may change from year to year based on the cost of MASBO trainings and program delivery.

- **Class of 2027 tuition:** \$550 per year (assessed annually). This includes 30+ hours of training through quarterly New SBO Academy sessions, forum access until graduation, and Academy swag. Trainings outside of New SBO quarterly sessions and Summer Conference registrations are not included.
- **Class of 2028 tuition:** \$600 per year (assessed annually). This includes 30+ hours of training through quarterly New SBO Academy sessions, forum access until graduation, and Academy swag. Trainings outside of New SBO quarterly sessions and Summer Conference registrations are not included.
- **Pre-Academy Bridge Program tuition:** \$350 (optional add-on for eligible Class of 2028 registrants).

The registration process is not complete until Academy tuition is received in full. Please see the Payment Terms for more information.

KEY PROGRAM POLICIES & TERMS

Seat-Based Enrollment and Transfer Policy

New SBO Academy participation is provided through a seat-based license. The seat belongs to the district, not the individual member.

- If an Academy member moves to another district, the Academy seat does not follow them. The seat remains with the original district.
- The district may transfer (reassign) the seat to another employee of the same district prior to January 17, 2026, if the district wishes.

Transfers are not allowed after January 17, 2026. If an Academy member leaves the district after the cut off date, MASBO highly recommends the district invest in the new hire by enrolling them in the Pre-Academy Bridge Program (when available) and the full two-year Academy.

Refund Policy

MASBO does not provide refunds for dropouts. This policy supports a strong commitment to MASBO, the Academy experience, and each cohort community.

- No refunds are provided for non-participation, withdrawal, or opting out of the forum.
- Whether a member participates or not, they will continue to have access to Academy content for the lifetime of the content or the lifetime of their MASBO membership (whichever ends first).
- Forum access is turned off upon graduation (even if access to other Academy content remains available).

Use of Materials and Intellectual Property Policy

Ownership of MASBO materials: Academy materials—including but not limited to slides, handouts, templates, tools, checklists, recordings, website/forum content, and Learning Hub content—are owned by MASBO and/or its content partners/presenters and are protected by intellectual property laws.

Participants may not:

- Post Academy materials or recordings publicly (websites, social media, public file shares, etc.)
- Distribute Academy materials outside the participant's district or to non-members/non-participants
- Sell, license, or commercially reuse Academy materials
- Remove MASBO branding/attribution on MASBO-created materials (where present)
- Record trainings (audio/video/screenshots) or redistribute recordings unless MASBO expressly authorizes it

Presenter/third-party content: Some Academy content may be owned by presenters or third parties. Use of such content is limited to what MASBO provides for Academy participants and must follow any restrictions provided.

Payment & Invoicing: Annual Academy tuition is invoiced to the registering party at the time of registration unless otherwise arranged in writing. The registration process is not complete until Academy tuition is received in full. Payment is due according to the invoice terms. Access to Academy content and the forum may be delayed or suspended if payment is not received within 60 days.

Completion Requirements: Successful completion of the New SBO Academy requires meaningful participation across the two-year program, including engagement with quarterly training sessions (live or recorded) and professional participation in the Academy forum. MASBO reserves the right to define minimum participation standards for graduation recognition.

Seat Transfer & Graduation Eligibility: If a district reassigns an Academy seat to a new employee, the replacement participant's eligibility for graduation recognition will be determined based on their remaining participation time and engagement.

Training Schedule Changes: MASBO reserves the right to adjust training dates, formats (in-person, virtual, or recorded), content, or facilitators as needed due to logistical, operational, or unforeseen circumstances. Such changes do not constitute grounds for tuition adjustment or refund.

Recording & Media Consent: By participating in the New SBO Academy, members consent to the recording of training sessions and related activities. Recordings may be used for Academy access, professional development, or future MASBO educational purposes.

Forum Use & Moderation: MASBO reserves the right to moderate forum discussions to ensure a professional, respectful, and supportive learning environment. MASBO may remove content or restrict forum access for violations of program expectations, ethical standards, or acceptable use guidelines.

Confidentiality & Sensitive Information: Academy participants are expected to avoid sharing confidential, personally identifiable student information, protected personnel data, or sensitive district-specific information. Discussions should be generalized and anonymized in accordance with FERPA and professional standards.

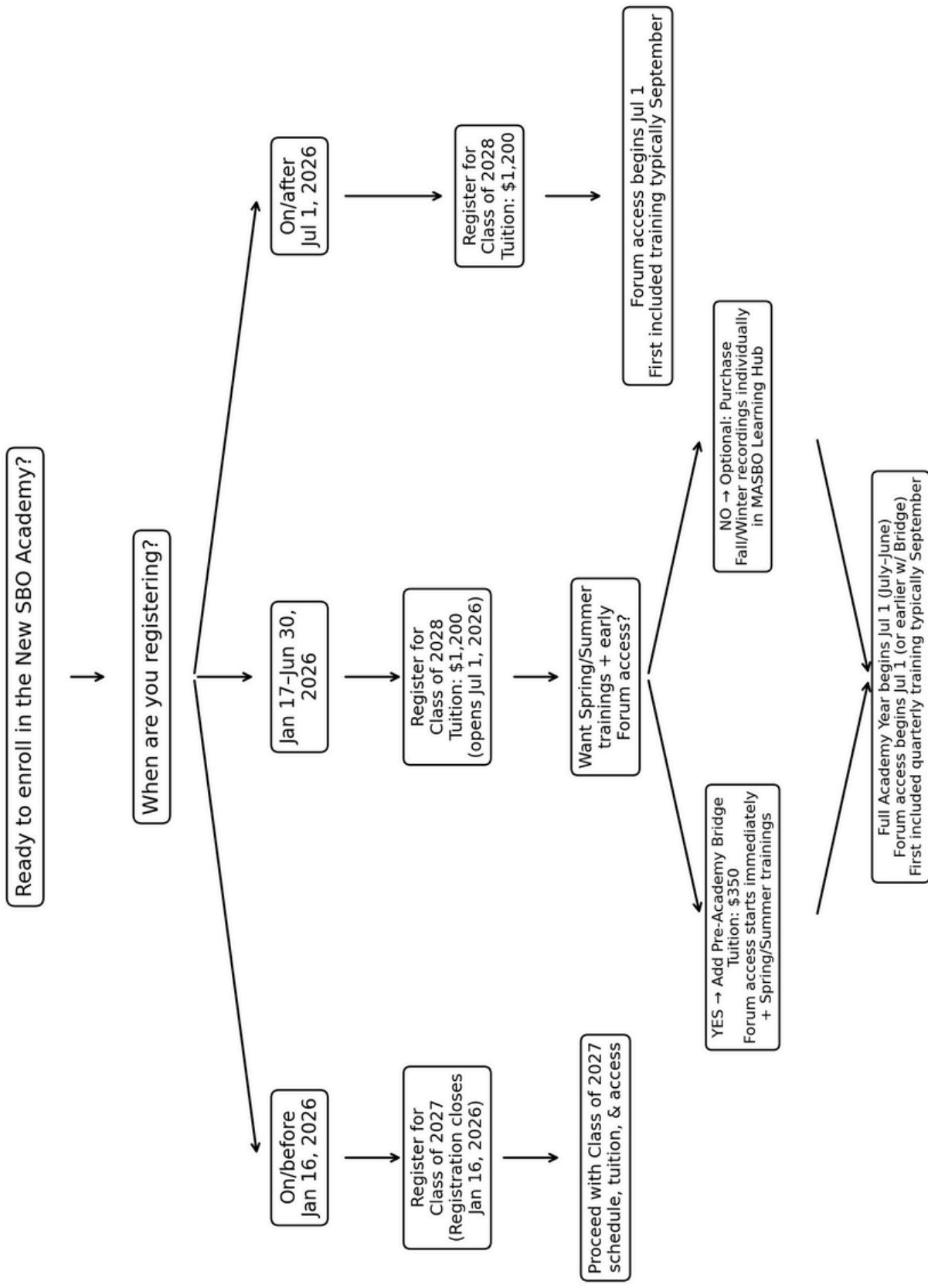
Non-Discrimination and Anti-Harassment (Academy Trainings + Online Community)

MASBO is committed to providing a professional, welcoming, and respectful learning environment for all New SBO Academy participants, presenters, guests, volunteers, and staff—across all Academy spaces including in-person events, virtual trainings, the Academy forum/online community, email communications, and any MASBO-hosted or MASBO-facilitated Academy gatherings.

MASBO does not tolerate discrimination or harassment based on race, color, national origin, ancestry, religion, creed, sex, pregnancy, sexual orientation, gender identity or expression, age, disability, genetic information, marital status, veteran or military status, or any other characteristic protected by applicable law.

Extenuating circumstances: Extenuating circumstances may warrant a case-by-case review of these policies. Requests for review should be submitted in writing to MASBO.

New SBO Academy — Registration Pathway (Preview)





Academy Registration Form & Participation Agreement

FULL NAME: _____

SCHOOL DISTRICT: _____

JOB TITLE: _____

SBO YEARS OF EXPERIENCE: _____

SOFTWARE: _____

DO YOU HAVE A MENTOR? Yes No

*The Mentor Program is separate from the New SBO Academy, if you do not have a Mentor and are interested in the program please complete this [application](#) and return to mroach@masbo.com.

By registering for the New SBO Academy, I agree to the following terms in addition to all program information outlined in the Program Guide:

- **Seat-Based License:** Academy enrollment is a district-owned, seat-based license. If I leave my district, my Academy seat does not transfer with me. The district may reassign the seat at its discretion.
- **Tuition & Refund Policy:** Academy tuition is non-refundable and non-adjustable. No refunds will be issued for non-participation, withdrawal, or dismissal. Access to Academy content continues for the life of the content or MASBO membership.
- **Cohort Placement & Registration Timing:** Cohort assignment is based on registration date. I understand the Class of 2027 and Class of 2028 timelines and Pre-Academy Bridge options.
- **Participation & Completion Expectations:** Successful completion requires active engagement in trainings and Academy community activities over the full two-year program.
- **Forum Access & Conduct:** The Academy forum is a shared space for all cohorts. Forum access ends upon graduation. MASBO may moderate or revoke access for policy violations.
- **Non-Discrimination & Anti-Harassment:** I agree to participate in a respectful, inclusive learning environment free from discrimination, harassment, bullying, or retaliation.
- **Confidentiality:** I will not share student personally identifiable information or confidential district matters and will anonymize examples when appropriate.
- **Use of Materials & Intellectual Property:** Academy materials are for internal professional use only and may not be publicly shared, redistributed, or recorded without permission.
- **Recording Consent:** I understand Academy sessions may be recorded and my participation constitutes consent to recording for Academy use.
- **Schedule Changes & Program Modifications:** MASBO may adjust schedules, formats, or content as needed without refund or tuition adjustment.
- **Extenuating Circumstances:** MASBO may review unique situations on a case-by-case basis, but is not obligated to grant exceptions.

SIGNATURE: _____ **DATE:** _____