63rd ANNUAL SWMSBO 2017 CONFERENCE SESSIONS

Sessions #1 8:30 – 9:30 a.m.

How to Prepare for a Headache-Free Audit — Room 204
Molly R. Fish, CPA-Manager Accountant – Yeo & Yeo, CPAs & Business Consultants
Pick up a few tips and tricks to help you prepare for a year-end audit that does not end with a migraine!

Outside the Box Ideas to Improve — Room 205
Bruce Dunn & Steve Piesko, Shareholders – Maner Costerisan PC
Ideas to be more efficient and effective during your workday.

Emerging Issues Under PA349, Financial Cost of Absenteeism & Latest on the FMLA — Room 208
Marshall W. Grate, Attorney & Kara T. Rozin, Attorney – Clark Hill PLC
Employee issues such as FMLA, employee attendance, right to work, union dues vs non-union and more.

Educating Staff on Retirement Preparedness — Room 209
Richard E. Williams, President – Williams & Company
Educating staff on retirement preparedness and getting employees prepared in case the pension plus hybrid plan is eliminated.

Stress Busters 101 — Room 210
Mona Tropf, RN BSN MPA CWP – MESSA
In this interactive workshop, we will take a glimpse of common stressors and the health price we all pay when stress gets out of control. The good news is there is several effective strategies to help us deal with the stressors of life – we will take an in-depth look at a few, and even do a little practice! Now is the time to take control of your stress!

HR Hot Topics — Room 211
Tom Zahrt, Asst. Superintendent of Human Resources & Communications – Kalamazoo RESA
From wage and hour changes, to the Affordable Care Act under a new Presidential administration, to the challenges of FMLA, we will explore the hot HR topics of our day. Bring your challenging HR issues with you and we will discuss them together (protecting the identities of the staff involved) and come up with recommendations for approaching your specific scenario so you can go home with a good game plan.

Building High Performance Teams — Room 212
Brian Schupbach, Director of Technology – KRESA/AAESA/SW MiTech
Learn how to build and maintain high performance teams. Using a five-step process, we will look at how to hire team players, establish the proper team size, create clarity, peer accountability, and improve team performance using the Synergistic Problem-Solving Model.

Life Lessons and Leadership — Room 213
Ed Stasiak, Vice President – KSS Enterprises
Learn from an experienced businessman about four key life lessons that have influenced his leadership style and how they have been used to grow several organizations. Hear how he had turned around numerous companies and made them successful with careful analysis of the environment and implementing appropriate changes and how these lessons can apply to your organization.

Office of State Aid & School Finance Update *(Repeated at Sessions #2)* — Room 242
Christopher May, Financial Analyst, Phil Boone, Assistant Director, & Jessica Beagle, Financial Analyst – Michigan Department of Education (MDE)
Get the latest information on state aid and school finance in Michigan. Topics covered will include accounting and financial reporting updates, the State School Aid budget, indirect costs, and other current topics. There will also be plenty of time for questions and answers.

Start with the Money — First Floor (Downstairs) Room 105
Paul Wills, Partner – Plante Moran Cresa
With recent increasing housing values throughout the State of Michigan resulting in greater taxable values, learn how districts are reviewing their facility and technology needs in conjunction with current and projected millage rates to create a long term strategic capital plan.

Voter Approved Bond Issues and Relief For Your Budget — First Floor (Downstairs) Room 107
Jesse R. Nelson, CPA – H.J. Umbaugh & Associates, Certified Public Accountants, LLP (“Umbaugh”)
This session will review how to use voter approved bond issues to create a long-term capital improvement plan that will relieve the general fund of technology, bus purchases, and other improvements. In addition, we will review financial techniques available that maximize project dollars.

Sessions #2 9:35-10:35 a.m.

Don't Say Ugh! To UGG Procurement Room 204
Molly R. Fish, CPA-Manager Accountant – Yeo & Yeo, CPAs & Business Consultants
Learn about UGG procurement changes, implementation deadlines, and other helpful hints to ensure compliance at your district.

Worker's Compensation – Do You Know the Facts? Room 205
Darci Muller, PC/WC Account Executive – SET SEG
Simple slips, trips and falls are the leading types of accidents resulting in WC claims. Learn how to protect yourself and your employees from encountering an injury while on the job as SET SEG shares preventative tips and practices.

SAANS, TANS, Sinking Funds & IPA's – Financing Everyday Needs Room 208
Joseph B. Urban, Attorney & Peter S. Ecklund, Attorney – Clark Hill PLC
In these times of austerity, school districts are challenged like never before to find ways to provide for their everyday operations in a way that does not burden the general fund. While borrowing for state aid has become a mainstream practice, there are some little known tips and tricks to make your funds go further and to keep your interest rate down. Likewise for those districts whose tax bases support tax anticipation notes, borrowing for busses and financing sinking fund projects under the new sinking fund legislation. Clark Hill's education law public finance team will present a short session on how to negotiate the best deal possible for your school district, as well as pitfalls and opportunities.

Integrating Your "Microsoft Office Mindset" into the "Google Drive Mindset" Room 209
Cheryl Wilson, Teacher Technology Consultant – Wayland Union Schools
We will explore how to use knowledge of Microsoft Office to better navigate within Google Drive. We will take a tour of the basic Google Drive Apps (Docs, Sheets, Slides, and Mail). In addition, tips and tricks will be shared along the way.

Cash Flow & Investment Strategies for School Districts Room 210
Mark Rochford & Nick Armelagos, Senior Managing Consultants – UMBAUGH
This session will cover the benefits of cash flow forecasting, what information is required, forecasting methods, the mechanics of producing cash flow reports, review of a sample report as well as explain how to use cash flow forecasting to optimize borrowing and investing for the district.

Legislative Update *(Repeated at Sessions #3)* Room 211
Jennifer Smith, Director of Government Relations – Michigan Association of School Boards (MASB)
Hear firsthand what is happening in Lansing that will impact schools and how we operate.

Risk Management for School Districts Room 212
Kurt M. Graham, Attorney – Mika Meyers PLC
A discussion of helpful tips so public schools can minimize their potential legal liability.

Organizational IT Assessments Room 213
Matt Lindner, Senior Consulting Manager – Plante Moran
Your district's investment in technology represents a significant allocation of resources, but when is the last time you stepped back from day-to-day management to evaluate its true cost and effectiveness? Taking that step back is even more important now than it used to be. Find out how an assessment of your IT organization, administration and technologies can help maximize the impact of technology dollars.

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Office of Retirement Services Update First Floor (Downstairs) Room 105
Mary Staley – ORS
The Office of Retirement Services will provide an update on the new and exciting things going on at ORS—all the hot topics.

Banking/Investing for the New Business Manager First Floor (Downstairs) Room 107
Brian Quinn, Director – PFM Asset Management LLC
This presentation will discuss the current school code regulating investments, developing an investment policy, cash flow analysis and investing/borrowing options.

Sessions #3 11:20 a.m. - 12:20 p.m.

News & Trends in Healthcare — Room 204
Heather Menzies – SET SEG
Do you wonder what the future of healthcare looks like? Join SET SEG's Employee Benefits expert for an update on where healthcare stands today and what school districts, as an employer, should be doing. We will examine trends in the marketplace & discuss approaches that could save money.

Municipal Disclosures & Ratings — Room 205
Kari L. Blanchett, Managing Director – PFM Financial Advisors, LLC
The SEC and MSRB have been focusing on municipal disclosures and/or lack thereof. Learn your requirements under the disclosure laws. Additionally, the session will touch on municipal bond ratings, key areas schools should focus on in maintaining and/or improving your bond ratings.

Excel Tips & Tricks — Room 208
Nathalie Alwane, Digital Media Specialist – Kalamazoo RESA
Learn about the functionality and versatility of Microsoft Excel and some tips & tricks, which will make your work a lot easier. Excel tips and tricks you can start using today – okay maybe tomorrow.

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"On the Go" Wellness: How to Fit it All In! — Room 210
Julie Blodgett, PT, Wellness Director – Northern Physical Therapy
We all know that making better choices for healthy living is important to our home and work lives. The question is…how do we fit it all in? This presentation will explore the benefits of better food choices, reducing stress, being more physically active and getting quality sleep, and will provide practical suggestions to fit it into a busy lifestyle.

What I Wish I Would Have Known Sooner — Room 211
Mark Williams, Eastern Regional V.P. – National Insurance Services
Improving the mentoring program for new and newer school business officials.

REP – What's It All About? — Room 212
Cheryl Twichell, Data Systems Area Manager & Caitlin Groom, Data Collection Analyst – Center for Educational Performance & Information (CEPI)
This session will include an overview of the REP Application, including new information for the EOY 2017 submission, the data submission process (bulk upload and online single submission), which employees should be reported, clarification on how to report new teachers, terminated employees and employees on loan or leave, the connection between REP and TSDL (connecting teachers to students), and reporting quality data.

School Board Report Preparation — Room 213
Buzz Brown – Munetrix
Learn to put together effective reports for school board presentations. Highlight the most important information, including financial reporting.

Using Data Analytics in Budgeting & Negotiations — Room 242
Chris Stephens & Tim Raymer – Eidex
Members will learn how, through peering and data analytics they can identify cost savings, best practice to build your budget and prepare to negotiate. The session will also demonstrate how to communicate to your publics more efficiently and effectively.

Banking Update — First Floor (Downstairs) Room 105
Dan VandenBosch & Jamie Hebebrand, Government Relationship Managers – Huntington Bank
Hot Topics in banking, which includes: fraud, purchase cards, account types and investments to take advantage of higher interest rates.

Lessons Learned from Deficit Districts & Those Near the Edge — First Floor (Downstairs) Room 107
Don Sovey, CPA, CFO – School & Municipal Advisory Services, PC
This session will highlight 12 unnamed Michigan districts that have worked hard to improve their financial health while facing steep enrollment declines and shrinking budgets. See how many have improved their financial strength over the last six years despite what seemed like unsurmountable odds. You will learn the budgeting, forecasting, and business techniques used to turn their financial trajectories around even before early warning legislation was adopted.