



Michigan School Business Officials

# ANNUAL REPORT 2018-19

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# 2018-19 Board of Directors

The MSBO Board of Directors consists of nine voting members plus an Associate Member Representative and MSBO's Executive Director. The Board meets regularly throughout the school year and oversees the Michigan School Business Officials.

## Officers



**President**  
**Mike Hagerty, CFO**  
Assistant Superintendent  
Administrative Services  
Kent ISD



**President-Elect**  
**Thomas L. Armstrong, CPA, CFO**  
Business Manager  
Fulton Public Schools



**Immediate Past President**  
**Steven G. Ezikian**  
Deputy Superintendent  
Wayne RESA



**Executive Director**  
**David Martell, CPA, CFO**  
Executive Director  
MSBO

## Directors



**Kent J. Cartwright, CPA, CFO**  
Chief Financial Officer  
Public Schools of Petoskey



**William Chatfield, CFD**  
Director of Operations  
Walled Lake Consolidated Schools



**Deanna Mayer, CPA, CFO**  
Director of Finance and Human  
Resources  
Eastern Upper Peninsula ISD



**Julie Omer, MBA, CPA, CFO**  
Chief Financial Officer  
Owosso Public Schools



**Mary Beth Rogers, ED.S, CFO**  
Executive Director of Business  
Services  
Clarkston Community Schools



**Stephanie Weese, CFO**  
Associate Superintendent of Finance  
Montcalm Area ISD



**Associate Member Representative**  
**Lisa Truscott**  
Chief Corporate Communications Officer  
SET SEG

# Membership & Member Involvement

## 2018-19 Regional Presidents

**Allegan County**  
Lisa Bradley, CFO  
Allegan Area ESA

**Grand Valley**  
Tina Wright, BOM, HRS, CFO  
Muskegon Public Schools

**Monroe/Lenawee**  
Nicole Reinhardt, BOM  
Lenawee ISD

**Saginaw Valley**  
Carrie Sekelsky, CFO  
Montrose Community Schools

**Upper Peninsula**  
Jason G. Auel, CFO  
Copper Country ISD

**Berrien/Cass/Van Buren**  
Brian Brown, BOM  
River Valley School District

**Lakeshore SBO**  
Mark Mesbergen, CFO  
Fruitport Community Schools

**Northern Michigan**  
Shay Anderson, CFO  
Clare-Gladwin RESD

**South Central**  
Rebecca Jones, BOM, CFO  
Marshall Public Schools

**Washtenaw/Livingston**  
Denise Kerrigan, CFO  
Whitmore Lake Public Schools

**Central Michigan**  
Jon Laing, CFO  
Lansing School District

**Macomb/St. Clair County**  
Linda Renno, CFO  
Warren Woods Public Schools

**Northwest Michigan**  
Michelle Meeder, BOM  
Mancelona Public Schools

**Southwestern**  
Michele Buckley, BOM  
Kalamazoo RESA

**Wayne County**  
Andrew McMechan, CFO  
Garden City Public Schools

**Genesee Area**  
Rhoda Johnson, CFO  
Genesee ISD

**Middle Michigan**  
Kevin Kolb, CFO  
Gratiot-Isabella RESD

**Oakland County**  
Kandice Moynihan, CFO  
Troy School District

**Thumb Region**  
Allison Zimba, CFO  
Cass City Public Schools

**Western Area**  
Christopher Lamer, CFO  
Ottawa Area ISD

## 2018-19 Committee Chairs

### Program & Research

**Facilities Management**  
Tim Peraino, CFO  
Kent ISD

**Food & Nutrition Services**  
Jessica Endres, CND  
Thornapple Kellogg Schools

**Intermediate School District**  
Lisa Krosnicki, CFO  
Charlevoix-Emmet ISD

**Professional Development**  
Neil R. Cassabon, CFO  
Warren Woods Public Schools

**School Finance Services**  
Robert T. Berlin, CFO  
Hastings School District

**Technology**  
Richard Webb, CTO  
Fremont Public Schools

**Transportation**  
Thomas Moore  
Washtenaw ISD

### Administrative

**Bylaws and Resolutions**  
Jason R. Helsen, SFO, CFO  
Reeths-Puffer Public Schools

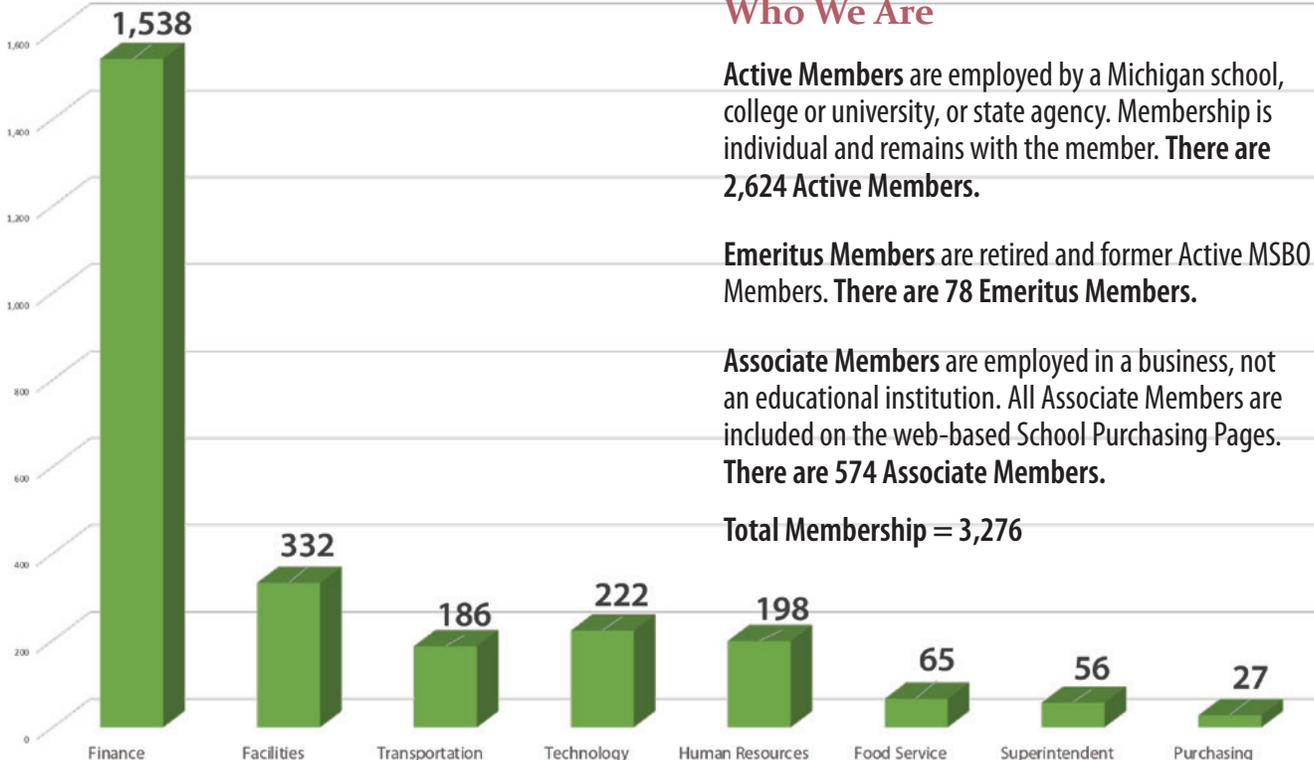
**Elections**  
Kent J. Cartwright, CPA, CFO  
Public Schools of Petoskey

**Financial Review**  
Robert Spagnuolo, CPA, BOM  
DeWitt Public Schools

**Membership**  
Steven Lenar, CFO  
Holly Area Schools

**Nominations**  
Steven G. Ezikian  
Wayne RESA

## Active Members



## Who We Are

**Active Members** are employed by a Michigan school, college or university, or state agency. Membership is individual and remains with the member. **There are 2,624 Active Members.**

**Emeritus Members** are retired and former Active MSBO Members. **There are 78 Emeritus Members.**

**Associate Members** are employed in a business, not an educational institution. All Associate Members are included on the web-based School Purchasing Pages. **There are 574 Associate Members.**

**Total Membership = 3,276**

# Program Highlights

81st Annual Conference & Exhibit Show  
April 30-May 1 • Grand Rapids, MI

1,633  
Participants

180  
Topics

302  
Presenters

365  
Exhibit Booths

- 6 Pre-Conferences
- Facilities
  - Finance
  - Food & Nutrition Services
  - Human Resources
  - Technology
  - Transportation

149  
Breakout Sessions



## Opening General Session

The Opening General Session featured Michigan State University (MSU) Professor of Education Policy David Arsen. Dr. Arsen talked about a MSU study that focuses on Michigan K-12 funding: Michigan School Finance at the Crossroads, which focuses on a plan to transform K-12 funding in Michigan schools.



**Keynote: Motivational humorist Kay Frances** shared her message to “lighten up, stress less, and take care of ourselves.”

When it comes to humor, Kay is the “real deal” having performed as a professional standup comedian for many years and appearing on a number of national television and radio programs. Additionally, Kay is the author of “The Funny Thing about Stress; A Seriously Humorous Guide to a Happier Life.”



## Governor's Address

Governor Gretchen Whitmer addressed the MSBO membership during the lunch program on Wednesday and talked about her commitment to solving the problems Michigan citizens face every day. That means ensuring a great public education and a path to a good-paying job.

# Program Highlights

**Business Manager/CPA Workshop:** Provides timely information for practicing CPAs and business managers.

**328**  
Participants

**Group Solutions-Current Issues:**

Provides hands-on business office self-assessment, discussion, and real-world problem solving. Attendees get straight talk and advice from other professionals facing the same issues.

**63**  
Participants

**MDE/MSBO Workshop:** Highlights the latest from the Michigan Department of Education on state aid and other hot topics.

**279**  
Participants

**MSBO Leadership Institute:** The MSBO Leadership Institute is designed to help members reach that next level in their professional life.

**24**  
Participants

**Financial Strategies Conference:** Members learn the latest information on the economy, budget, state aid, legislation, and other hot topics just in time for budgeting and negotiations.

**292**  
Participants

**Annual Facilities/Operations Director Conference & Expo:** School facilities represent a tremendous resource and responsibility for districts and those in operations & facilities require the knowledge and understanding of a myriad of issues.

**300**  
Participants

**Business Manager Academy:** “Engage through knowledge, application, and mentorship.”

MSBO partnered with skilled past and present business managers to share their knowledge and experience in school finance at MSBO’s first ever Business Manager Academy. The Academy provides in-depth, practical, “hands-on” working knowledge in school finance

**70**  
Participants in  
Three Regions

**Introduction to School Business:** Designed for new business officials (within the first few years of employment), office staff, and those who want a basic information refresher.

**159**  
Participants

## Alliance Building/Advocacy



One of MSBO’s roles is to advocate for membership and serve in an expert capacity, whether it be providing testimony at a state Senate or House legislative committee, or working with a state stakeholders group that is addressing education and school administration policy.

MSBO’s long standing policy in legislative issues remains to be the role of providing facts, data, and testimony when requested by other groups or the legislature. MSBO staff represents members and the school community at a number of state agencies, department stakeholders groups, and other organizations, always providing expert input on numerous issues to address the needs of MSBO members.

# MSBO Award Recipients

MSBO has created awards to help school districts celebrate successes and to recognize the extraordinary contribution of individuals to their school district and MSBO.

## Distinguished Service Award:

- Gary L Start, Kalamazoo Public Schools

## School Business Official of the Year:

- Cheryl S Wald, Mason Public Schools

## Friend of Education:

- School Finance Research Collaborative

## President's Award:

- Jeffrey C Mills, Van Buren ISD
- Timothy A Raymer, Emeritus

## Meridian Award of Excellence:

- Maintenance, Operations & Technology Departments
- Wayne-Westland Community Schools
- Theo Kerhoulas and David Koester, Port Huron Area School District
- Jon Barth, Berkley School District
- Teri Les, Walled Lake Consolidated Schools

**Stebbins Scholarship:** No Stebbins Scholarship was awarded this year.

## Piper Scholarship:

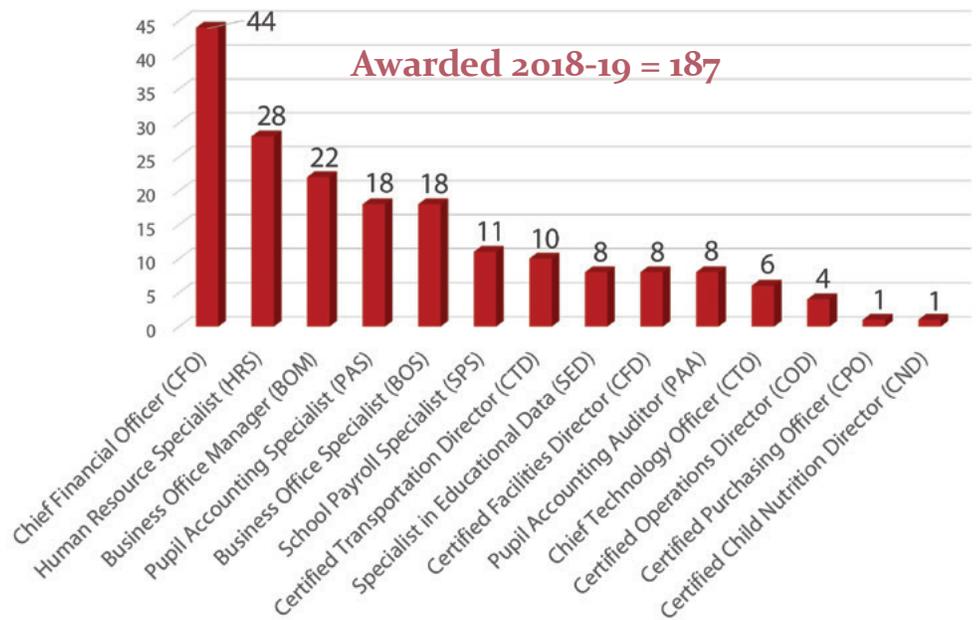
- Emily Jacques, Eastern Upper Peninsula ISD
- Emili Jones, Jackson County ISD
- Devin Kling, Memphis Community Schools
- Jonathan Laing, Lansing School District
- Kara Long, Lenawee ISD
- Allison Zimba, Cass City Public Schools

# MSBO Voluntary Certification

MSBO certification is a voluntary system providing focused training to school business officials offering practical information that will help school business officials succeed and excel in their employment.

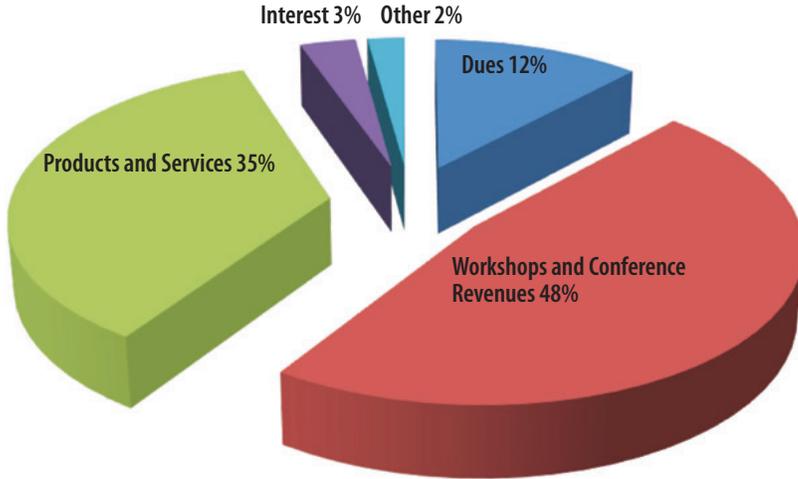
The program is endorsed by both the Michigan Association of School Boards (MASB) as well as the Michigan Association of School Administrators (MASA). MSBO offers 14 separate certification tracks.

Since 1998, more than 2,800 members have earned a MSBO Voluntary Certification Award.



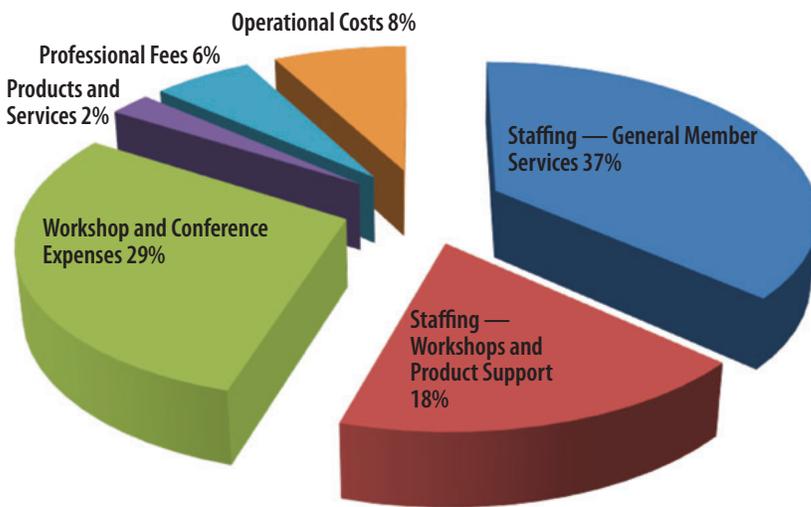
# Financial Review

## Revenues by Category



Dues	\$420,587
Workshops and Conference Revenues	1,666,764
Products and Services	1,242,918
Interest	113,301
Other	75,561
<b>Total</b>	<b>\$3,519,131</b>

## Expenses by Category



Staffing — General Member Services	\$1,078,739
Staffing — Workshops and Product Support	527,271
Workshop and Conference Expenses	864,858
Products and Services	71,583
Professional Fees	171,294
Operational Costs	229,024
<b>Total</b>	<b>\$2,942,769</b>

## Balance Sheet

### Assets:

Current Assets	\$5,088,370
Long Term Assets	903,817

**Total Assets** ..... \$5,992,187

### Liabilities and Net Assets:

Current Liabilities	\$352,260
Long Term Liabilities	129,607

### Net Assets:

Designated	1,335,187
Other	4,175,133

**Total Liabilities and Net Assets** ... \$5,992,187

The Financial Review Committee met October 15, 2019.

The Committee is comprised of:

- Robert Spagnuolo, DeWitt Public Schools (Chair)
- Paul Bodiya, Macomb ISD
- Brian Marcel, Washtenaw ISD

MSBO President-Elect Bill Chatfield, MSBO Executive Director David Martell, MSBO Deputy Executive Director Bob Dwan, MSBO Accountant Patty Lenneman, and Paul Bryant from Plante Moran were also in attendance.

The annual MSBO audit, conducted by Plante Moran, received a clean audit opinion. The Financial Review Committee voted to accept the report and recommended the full Board accept it. The MSBO Board accepted the audit report.

# Business Solutions & Partnerships

## ASBO — The Association of School Business Officials International



ASBO is MSBO's national/international organization. It provides programs and services to promote the highest standards of school business management practices, professional growth, and the effective use of educational resources. Founded in 1910, ASBO International has over 9,000 school business management professionals as members.

## Certification Program



The MSBO Certification Program is a voluntary program designed by our own Professional Development Committee in conjunction with others in the educational community. It is endorsed by both Michigan Association of School Boards (MASB) as well as Michigan Association of Superintendents and Administrators (MASA). MSBO offers 14 separate tracks and provides essential information to school business professionals at the beginning of their careers and assures continuing professional development throughout.

## Dude Solutions



Dude Solutions is the nation's number one provider of on-demand operations management solutions designed exclusively for the unique needs of schools, colleges, and universities. Their integrated suite of solutions for technology, business, and facility operations is revolutionizing the way educational professionals manage their organizations. Dude Solution's tools are easy to use and affordable; helping schools save money, increase efficiency, and improve services. MSBO's relationship provides significant discounts for Michigan school districts.

## Dynamic Budget Projections Software



This easy to use, simple to understand software is offered to school districts to use for financial forecasting. It provides multi-year budget projections in an Excel template. More than 500 districts and ISDs have purchased this software. It makes communicating financial information easier for school districts.

## Michigan Liquid Asset Fund Plus (MILAF+)



In 1987, MSBO, MASA, and MASB collaborated to form the Michigan Liquid Asset Fund Plus program. Districts that utilize the many banking-related services such as check writing, investment of bond proceeds, online Internet services, and fixed term investing also take advantage of the Fund's AAAM rating, security, and liquidity. Currently 425 school districts and other public entities participate in this program.

# Business Solutions & Partnerships

## Michigan Purchasing Card Consortium



The Consortium, similar to a credit card program, but better — allows school districts greater control of their expenses, saves time and money, and allows all districts to participate with the same, low fee structure. The 13th year was another great success for the program with districts earning approximately \$968,000 in rebates for the calendar year 2018.

## Michigan Schools Energy Cooperative (MISEC)



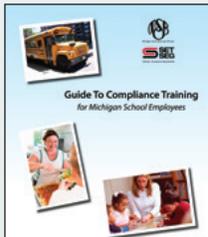
Michigan Schools Energy Cooperative (MISEC) was established in 1997 by MSBO, MASA, Michigan Association of Intermediate School Administrators (MAISA), Middle Cities Education Association (MCEA), and MASB as a joint venture to allow schools to take full advantage of cost-saving opportunities provided by energy deregulation.

## MSBO Bus Program



The bus purchase program saves districts time and money by providing a competitively bid quality base bus with over 300 options to choose from. All the bidding has been done for MSBO members. The program is provided through an online platform making access and use very convenient.

## MSBO/SET SEG Guide to Compliance Training



This guide is designed to help schools identify education and training that is required for Michigan schools. In an effort to make this guide as user friendly as possible, training is broken out by subject and by employee group. Every required training listed in the Guide also includes the governing reference, the training schedule, and the instructional courses available to help schools meet compliance obligations.

## PaySchools



PaySchools is an online payment processing system that provides schools with an easy and efficient method to collect fees and receive electronic payments for school lunches, field trips, prom tickets, and any other school-related fees. PaySchools makes it possible for all schools to offer parents the convenience of online purchasing without incurring large administration or setup costs.

# Business Solutions & Partnerships

## PublicSurplus.com

Public | Surplus™

Michigan school districts have used PublicSurplus.com successfully for over a decade selling surplus and used items. It allows members to reach a national, even international audiences for buses, equipment, and anything else school districts may wish to sell.

## SafeSchools



SafeSchools is a partner with MSBO, MASA and MASB and is an online safety training and tracking system designed specifically for school employees. Save training dollars and increase the opportunities for your staff to receive quality, timely training through SafeSchools.com. With more than 180 online programs, SafeSchools offers a tremendous value to districts.

## School Nutrition Association of Michigan (SNAM)

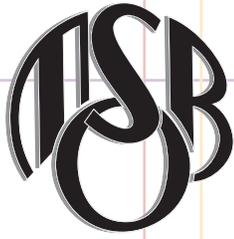


MSBO and SNAM continue a successful management partnership that started in 2013. MSBO provides administrative services, leadership assistance, and office space to SNAM. MSBO and SNAM have been closely affiliated for many years serving similar memberships. This partnership continues to benefit both MSBO and SNAM members.

## U.S. Communities



U.S. Communities provides a national purchasing co-operative for local and state government agencies, school districts (K-12), higher education, and non-profits nationwide by pooling the purchasing power of over 87,000 public agencies.



## Michigan School Business Officials

### MSBO Mission:

The Mission of MSBO is to continually improve the leadership of and management in school business and operational services, while enhancing the professional, social, and economic well-being of its members.

### MSBO Core Values:

- **The Value of Education.** We believe in the value of education. We will do all we can to support and enhance the delivery of education to Michigan's children.
- **Dedication to Leadership and Learning.** We believe each of us should be a leader and that effective leadership and management require a defined set of knowledge and skills as well as common sense. We will attend workshops and conferences and engage in other professional development activities that help us maintain and advance our knowledge. We will assist others in learning and ask questions of our colleagues when we need advice or information. We will approach all situations expecting to learn something.
- **The Power of Synergy.** We believe in approaching problems expecting to make a personal contribution to the solution and with the recognition that the best solutions are normally the result of working with others.
- **Commitment to Ethics.** We believe in operating our personal and professional lives in an ethical way that will reflect favorably on our schools and our profession. We believe we have a responsibility to act as stewards of our schools and to contribute to our communities and colleagues.

Based on these values, we believe in doing things right and in doing the right things.

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