



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

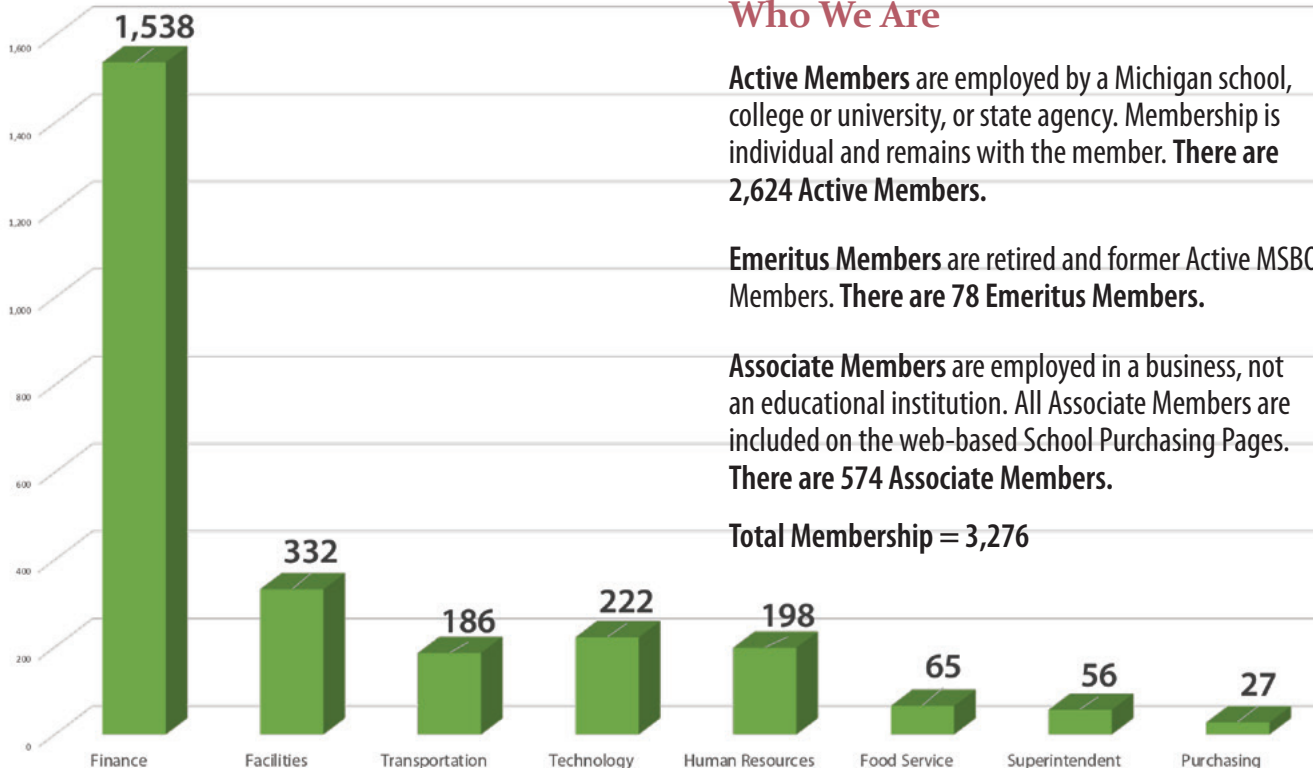
Elections
Kent J. Cartwright, CPA, CFO
Public Schools of Petoskey

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

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

279
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

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

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

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

24
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

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:

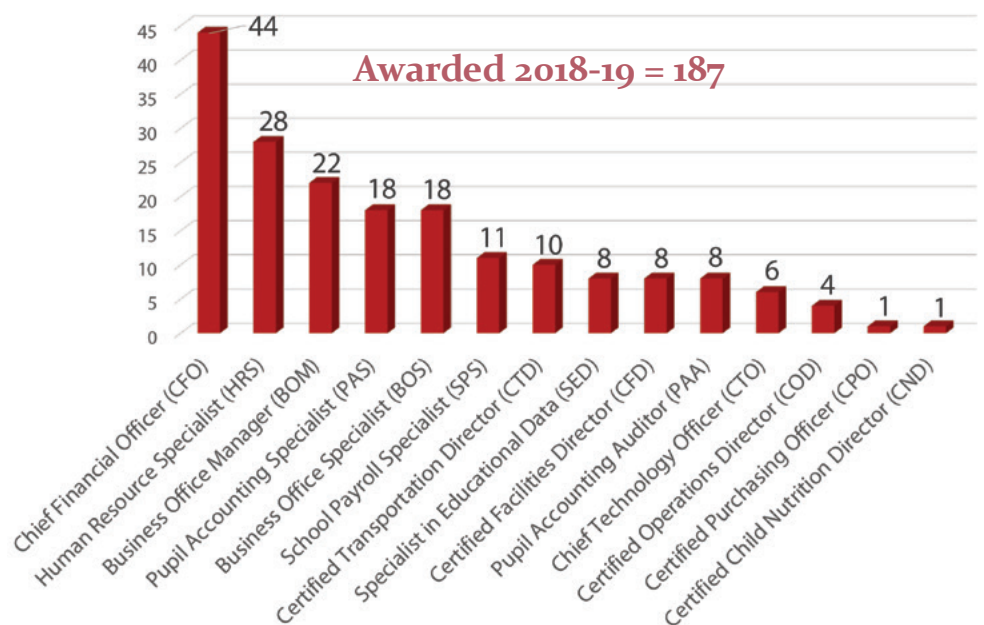
- Emily Jacques, Eastern Upper Peninsula ISD
- Emili Jones, Jackson County ISD
- Devin Kling, Memphis Community Schools
- Jonathan Laing, Lansing School District
- Kara Long, Lenawee ISD
- Allison Zimba, Cass City Public Schools

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.

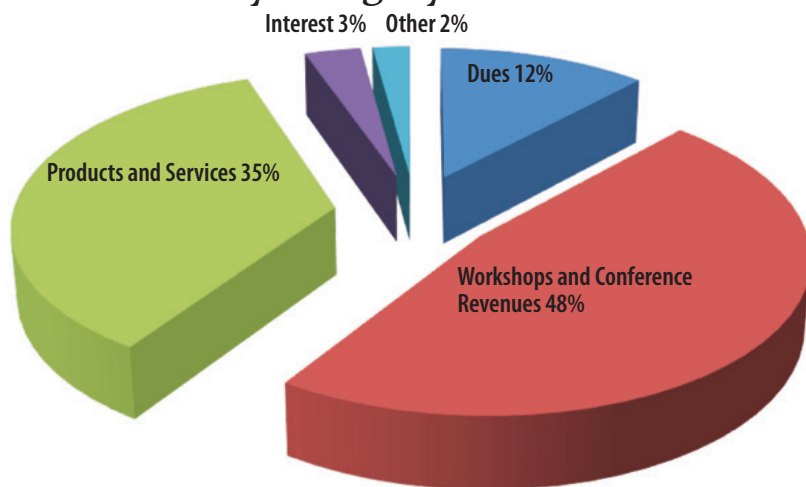
The program is endorsed by both the Michigan Association of School Boards (MASB) as well as the Michigan Association of School Administrators (MASA). MSBO offers 14 separate certification tracks.

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



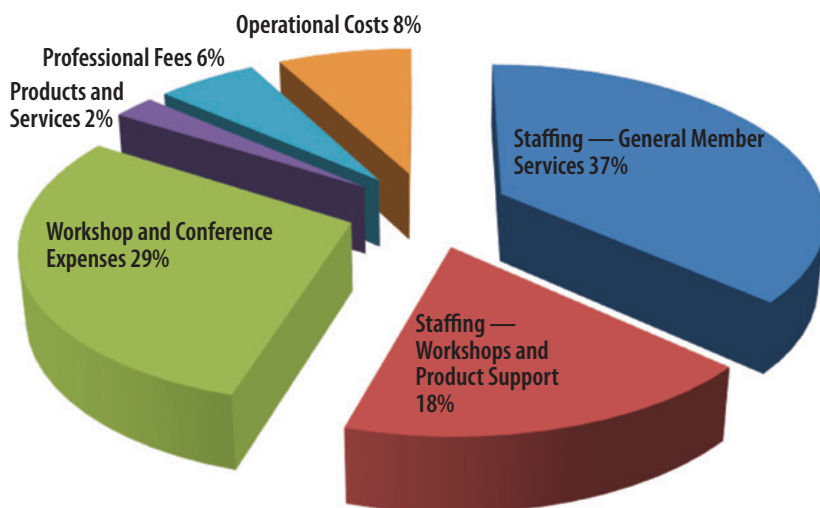
Financial Review

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
Total	\$3,519,131

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
Total	\$2,942,769

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.

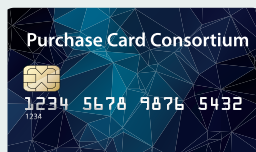
Michigan Liquid Asset Fund Plus (MILAF+)



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)



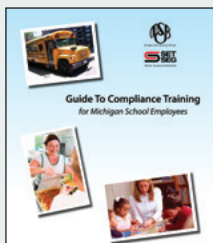
Michigan Schools Energy Cooperative (MISEC) was established in 1997 by MSBO, MASA, Michigan Association of Intermediate School Administrators (MAISA), Middle Cities Education Association (MCEA), and MASB as a joint venture to allow schools to take full advantage of cost-saving opportunities provided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



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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