

## SWMSBO Mid-Winter Conference

March 4, 2026

KVCC Main Campus

### Session #1 8:30-9:30

Room	Area	Presenter(s)	Topic	Description
1310	BOM	Philip Boone, Assistant Director; Christopher May, Financial Specialist & Kevin Walters, Supervisor- MDE Office of Financial Management	<b>MDE State Aid, Accounting and Grants Update</b>	Get the latest information on state aid, accounting, and grants update for districts. Topics covered will include accounting and financial reporting updates, the State School Aid budget, and federal grants. There will be plenty of time for questions and answers.
1320	HR, P/R	Stephanie Bowerson, Outreach Analyst; Dustin Duprest, Dept Analyst; Steve Cary, Audit Analyst - The Office of Retirement Services	<b>ORS Insights: Avoiding Common Errors</b>	The session begins with an introduction to the Office of Retirement Services (ORS), highlighting its mission, vision, and the members it serves. It then covers Final Payroll Details, including best practices to prevent common reporting errors. Next, the discussion focuses on contract reviews, outlining what is considered reportable and non-reportable compensation. The presentation concludes with important updates and new developments to help reporting units stay informed and compliant.
1330	ALL	Ryan Miller, Director of Technology & Paul Murray, Instructional Technology Coach - Portage Public Schools	<b>AI Won't Steal Your Job (But It Might Make Coffee Breaks Longer)</b>	In this session we will cover key principles, resources, and tips to keep in mind as you adopt AI (your new assistant who never calls in sick - but sometimes hallucinates!) into your work life.
1350	HR	Brad Galin, Director of Human Resources & Jennifer Meisterheim, HR Manager - Portage Public Schools	<b>HR Interpretive Dance</b>	Interactive open format to answer HR questions you're too afraid to ask anyone else. This session is non-judgmental, fun, and educational. Dancing is strictly optional!
4510	HR, P/R	Heidi Schiller, Assistant Vice President - VOYA Financial	<b>Back to Basics - State of Michigan 457 &amp; 401(k) Plans</b>	We'll get back to basics on the State of Michigan 457 & 401(k) Plans. This session will discuss the who, what, when, and where of the Plans. We'll discuss the role VOYA plays in the retirement process and available resources for you and your employees. Bring any questions that you may have!
4520	ALL	Dr. Diane Owen Rogers, Director of Culture and Belonging - Kalamazoo RESA	<b>How to Engage Conflict Productively</b>	Build confidence in engaging in difficult conversations while navigating disagreements with curiosity and clarity. This session helps school HR and business office staff recognize when to speak up, when to pause, and how to use self-reflection and "rumble language" to keep conversations productive and professional. We will apply these ideas by identifying next steps in scenarios as we practice how to manage conflict.
4530	HR, P/R	Melinda Nelson, Recruiting & Retention Specialist - Portage Public Schools	<b>REP Roundtable</b>	A time for attendees to discuss REP reporting and work through questions together. A document will be shared with basic REP information and links to supporting materials.
4540	BOM	Charles Sportel, Senior Manager & Madeline Coy, Manager - Plante Moran	<b>Navigating the Audit Process: Preparing Your Business Office and Reviewing Key Financials</b>	This session will walk through the full audit process, highlighting the responsibilities placed on the business office and offering practical strategies for preparation. Participants will learn how to proactively support auditors, organize documentation, and identify key areas within their financial statements that warrant close review. Whether you're new to audits or looking to refine your approach for FY26, this class will help ensure you're ready and confident.
4550	BOM	Michael Evrard, CPA - Principal Yeo & Yeo CPAs and Advisors	<b>Most Commonly Found Audit Issues</b>	Learn about the most common audit issues and how to ensure your district does not repeat them. The presentation will serve as a great audit preparation tool and companion to the district's year end closing process.
4560	ALL	Matthew Schueller, J.D., Director of Government Relations - Michigan Association of Superintendents & Administrators	<b>Legislative Update</b>	What's happening in Lansing? Join us for updates on the new legislative session, insights into the Governor's budget proposal, and a look ahead at the key issues expected to impact school districts in the year ahead.

### Session #2 9:35-10:35

Room	Area	Presenter(s)	Topic	Description
1310	BOM	Philip Boone, Assistant Director; Christopher May, Financial Specialist & Kevin Walters, Supervisor- MDE Office of Financial Management	<b>MDE State Aid, Accounting and Grants Update</b>	Get the latest information on state aid, accounting, and grants update for districts. Topics covered will include accounting and financial reporting updates, the State School Aid budget, and federal grants. There will be plenty of time for questions and answers.
1320	HR, P/R	Stephanie Bowerson, Outreach Analyst; Dustin Duprest, Dept Analyst; Steve Cary, Audit Analyst - The Office of Retirement Services	<b>ORS Insights: Avoiding Common Errors</b>	The session begins with an introduction to the Office of Retirement Services (ORS), highlighting its mission, vision, and the members it serves. It then covers Final Payroll Details, including best practices to prevent common reporting errors. Next, the discussion focuses on contract reviews, outlining what is considered reportable and non-reportable compensation. The presentation concludes with important updates and new developments to help reporting units stay informed and compliant.
1330	ALL	Ryan Miller, Director of Technology & Paul Murray, Instructional Technology Coach - Portage Public Schools	<b>Google Docs: New Features &amp; Hidden Gems</b>	Google Docs seems like old news, but a lot of new features have been added to make your life easier and efficient! We will cover document tabs, smart chips, task assignment, e-signature features and more.
1350	ALL	MaryJo D. Banasik, Ph.D., Attorney - Thrun Law Firm, P.C.	<b>Collective Bargaining Trends</b>	This presentation provides an overview of collective bargaining trends covering laws that impact collective bargaining, with updates on formerly prohibited bargaining subjects, employee leave, health insurance, and communication strategy during negotiations.
4510	HR, P/R	Heidi Schiller, Assistant Vice President - VOYA Financial	<b>Back to Basics - State of Michigan 457 &amp; 401(k) Plans</b>	We'll get back to basics on the State of Michigan 457 & 401(k) Plans. This session will discuss the who, what, when, and where of the Plans. We'll discuss the role VOYA plays in the retirement process and available resources for you and your employees. Bring any questions that you may have!
4520	HR, P/R	Aliceson Milanowski - Williams and Company Financial Services	<b>MPSERS and Other Retirement Complexities</b>	This seminar is an in-depth look at what to expect in retirement. Topics include retiree healthcare, pension benefits, retirement savings plans, and strategies for managing lifetime income. The session covers all Michigan public school retirement plans—BASIC, MIP, Pension Plus, and Defined Contribution. By addressing both defined benefit and defined contribution
4530	ALL	Rhonda Jones, RN, MS, BSN, CCM, CHES - MESSA	<b>Navigating the Change: Strategies for women going through Perimenopause and Postmenopause</b>	Navigating menopause can be challenging— this session will walk you through the complexities of the perimenopause to menopause transition and share practical, evidence-based strategies to help you take charge of your health and well-being. You'll learn what to expect during perimenopause and menopause, effective techniques for managing symptoms, ways to embrace this phase with confidence.
4540	HR, P/R	Lori Higgins, Noncriminal Justice Agency Auditor - Michigan State Police	<b>Noncriminal Justice Agency Use of Criminal Information</b>	Overview of requirements for NCJA agencies receiving Criminal History Record Information regarding policies and procedures and the audit process.
4550	BOM	Jeffrey Staley, Partner & Brenden Baker, Manager - Maner Costerisan	<b>What is new for 2026? Audit Updates</b>	This presentation will provide an overview of the Governmental Accounting Standards Board (GASB) Statements 103 and 104, which establish key guidelines for accounting and financial reporting by government entities. GASB 103 addresses the recognition of certain elements in financial statements, while GASB 104 provides guidance on how to properly report capital
4560	ALL	Matthew Schueller, J.D., Director of Government Relations, Michigan Association of Superintendents & Administrators	<b>Legislative Update</b>	What's happening in Lansing? Join us for updates on the new legislative session, insights into the Governor's budget proposal, and a look ahead at the key issues expected to impact school districts in the year ahead.

**SWMSBO Mid-Winter Conference  
March 4, 2026  
KVCC Main Campus**

**Session #3 12:15 - 1:15**

Room	Area	Presenter(s)	Topic	Description
1310	BOM	Julie Williams-Muz, CPA, CFO, M. ED., MSBO President, Director of Financial Operations - Bay-Arenac ISD	<b>From Manager to Mentor: Aligning People &amp; Purpose for Progress</b>	Learn how aligning staff, purpose, and culture builds strong teams and lasting progress - even through turnover and constant change.
1320	HR, P/R	Cathleen M. Dooley, Attorney - Thrun Law Firm, P.C.	<b>Avoiding HR Pitfalls: Legal Guidance for School Business Offices</b>	We will explore the most common mistakes school districts—and their business offices—make when managing employee and other HR-related matters. From FMLA and Title IX to staff discipline and documentation, legal counsel routinely sees well-intentioned processes go off track, often creating unnecessary risk for districts. Attendees will learn the proper steps to take, where breakdowns most often occur, and how the business office can play a key role in ensuring compliance and consistency.
1330	ALL	Tim Raymer, MSBO BMA; Samantha Ball, Superintendent/CFO, Martin PS; Abbie Jeplawy, Dir of Fiscal Services, Kentwood PS; Tom Lagone, Exec Dir of Finance & Business Operations, Kentwood PS	<b>Managing During Turbulent Times</b>	School business officials are under immense pressure. The combination of work load and uncertainty creates a challenging environment. We'll share some skills to navigate the business officials world.
1350	ALL	Jennifer Smith - Michigan Association of School Boards	<b>Latest from Lansing - Legislative Update</b>	This session will provide an update on current legislative activity in Lansing, highlight priorities and issues to watch for the remainder of the year, and review the Governor's budget proposal and its potential impact.
4510	BOM	Laura Casai, Project Director, Principal Interior Designer, Educational Planner, Dana McClellan, Senior Interior Designer, Meeghan Mooney, Senior Interior Designer - Kingscott	<b>Beyond Desks and Chairs: The Hidden Strategy Behind Smart FF&amp;E Purchasing</b>	Are you working through a bond, or just passed one? FF&E will likely be an integral part of your bond budget - and this session is for you! Most districts think of furniture, fixtures, and equipment (FF&E) as a straightforward purchase—but there's far more at stake. The business office plays a pivotal role in ensuring these investments align with timelines, budgets, and compliance requirements. A misstep in planning or procurement can create costly delays, disrupt learning environments, and waste valuable resources.
4520	BOM	Jessie Klisz, Manager & Nicole Abel, Senior - Plante Moran	<b>Uniform Grant Guidance Updates for 2026: What You Need to Know</b>	In April 2024, the Office of Management and Budget (OMB) released sweeping revisions to the Uniform Guidance (2 CFR Part 200), with implementation timelines that will directly impact fiscal years ending in 2026 and beyond. This session will provide a comprehensive overview of the most significant changes, including both administrative and audit-level updates, and equip attendees with the knowledge needed to navigate the new compliance landscape.
4530	BOM	Doug Phillips, Sr Vice President & Keith McDonald, Vice President - Plante Moran Realpoint	<b>Bond Program Financial Management</b>	Review of the rules, requirements, and challenges inherent in financial oversight of your bond program
4540	HR, P/R	Mandy Pearson, CHRISS Coordinator - Michigan State Police	<b>Understanding CHRISS</b>	Provide helpful tips and updates on the CHRISS system. Answering questions that agencies may have and discuss the full functionality of the CHRISS system.
4550	HR, P/R	Britani Olds, HR Administrator - Van Buren ISD	<b>Human Resources - Business Office Basics</b>	Are you new to the business office or new to HR in the education sector? If so, this session is for you. The focus will be on awareness and practical guidance to support compliance, as well as consistent and professional handling of processes and employee matters.
4560	ALL	Rebecca DePas, CPA, CFO, Director of Finance & Operations - Van Buren ISD	<b>MI Public School Payroll Basics: What Every Business Office Staff Member Should Know</b>	This session provides a practical overview of payroll operations in Michigan public schools, including employee classifications, contract pay vs. hourly pay, payroll calendars, retirement reporting (MPERS), tax withholdings, and common compliance requirements. Designed for both new and experienced staff, this session helps ensure accurate payroll processing and regulatory compliance.