



Michigan School Business Officials

Financial Strategies Conference Agenda January 19-20, 2021

Live Sessions *(Includes the ability to ask questions and will be available later On Demand.)*

Tuesday, January 19

8:30 am – Introduction and Overview (10 minutes)

Robert Dwan, MSBO

Get an overview of the event!

9:00 am – CARES – CRF – “The Aftermath” (50 minutes)*

Christopher May, MDE and Holly Stefanski, Plante Moran

Coronavirus Relief Funds have had a major impact on Michigan school funding. Now that the grant has ended, hear about reporting, recording, and other responsibilities to close things out!

10:30 am – The New World of Employee Benefits (60 minutes)

Jason Rushton and Lisa Stevens, American Fidelity 2020 — What a year! How confident are you that your employees have a thorough understanding of the benefits made available to them by your district? Join us to discuss employee education strategies, the trend of high deductible health plans, and new open enrollment ideas to help you feel confident that your employees have the education to make the appropriate choices for them and their families in this ever-changing environment.

1:00 pm – Legislative Update (30 minutes)

Chris Glass, West Michigan Talent Triangle

What’s new in the legislative arena? Plenty! One of the top school management lobbyists will address critical legislation and what you can do to get involved!

2:30 pm – Michigan School Budget Update and Economic Outlook (60 minutes)

Samuel Christensen and Jacqueline Mullen, House Fiscal Agency and Kathryn Summers, Senate Fiscal Agency

Senate and House Fiscal Agency school aid experts will explain the results of the January 2021 Consensus Revenue Estimating Conference (CREC) and what it could mean for current and future school funding.

Wednesday, January 20

8:30 am – Overview and Business Solutions (15 minutes)

Robert Dwan, MSBO

Get an overview of the day and hear about MSBO Business Solutions that can save your district time and money!

9:00 am – CARES – ESSER/GEER Update (50 minutes)*

Kevin Walters, MDE

With a due date of September 30, 2021, hear the latest from MDE and get any remaining questions addressed and/or issues resolved.

10:30 am – National Economic Outlook (60 minutes)

Lindsey Piegza, Stifel, Nicolaus & Company, Inc.

Gain an understanding of the national economy and what trends are telling the experts. Leadership changes, COVID-19 Pandemic, Global market, and economic pressures will all be discussed!

1:00 pm – Negotiations in the “New Normal” (45 minutes)

Raymond M. Davis, Thrun Law Firm, P.C.

Hear from an employment law expert on the latest negotiations strategies you’ll need to consider during these unprecedented times. Process, procedures, topics, tactics and what you may see come across the table are all fair game!

On Demand Sessions Available January 19 – February 9

(These recorded sessions that are not offered live do not include Q & A.)

Beyond the Numbers: Expansion of Fraud

Accountability (47 minutes)**

Tom Mitchell and Clint Pelfrey, President/CEO, Bonefish Systems

As we continue to understand and recognize the relevance of deterring fraud, the pressure and expectation of fiscal agent accountability rises. There is no choice but to confront the real potential of fraud by analyzing current policies and expanding controls to protect individuals and their district. It is time to look beyond just the validation of numbers and establish best-effort accountability and controls to deter fraud. Hear a demonstration the present state of fraud in the industry through statistics and case studies. Additionally, we will cover controls as well as tools, techniques and recommendations that will help fiscal agents establish the position of a best-effort fiscal agent.

each in a way that allows you to be most productive and mentally healthy.

Human Resources – Employee Leave During the

Pandemic (58 minutes)

Scott Sawyer, Saginaw ISD

Understanding your collective bargaining agreements is one thing... but understanding the many new leave provisions implemented throughout the pandemic can be confusing! Gain a better understanding of the maze of options available and how to ensure your district is following the new rules as intended.

MSBO Dynamic Budget Projections Software Demo

(32 minutes)

Christopher Frank, Bay Arenac ISD

MSBO offers a low-cost tool to assist you in providing high level budget information in an easy-to-understand format. Negotiations, board planning sessions, budget explanation, and the multi-year impact of decisions are the focus of this program! Interactive design makes “changes on the fly” easy. Great for the new business manager or those that need to enhance their current budget communication strategy.

Overwhelmed and Over It – Managing Pressure, Stress, and Anxiety for Maximum Productivity (67 minutes)

Joel McKenzie, Jason Rushton and Lisa Stevens, American Fidelity

Daily living provides many opportunities for dealing with stress. Feeling overwhelmed by all that’s confronting us can become a regular occurrence - until we decide to get over it. Breaking stress into three components instead of lumping everything under the heading of “stress” can help deal with feeling overwhelmed. We will define pressure, stress, and anxiety and discuss strategies for managing

School Aid Update (40 minutes) (may not be available on 1/19 but coming soon)

Philip Boone, MDE

What's new in the state aid school finance office for FY2021-22? Hear a recap of state aid changes and payments.

Title IX Changes? Do You Know the New Requirements? (51 minutes)

Brad Banasik, MASB

Major changes to Title IX rules have expanded the responsibility to act for most staff. Has your district provided the proper training and put protocols in place to comply? Learn what you need to do!

Top Five Data Points and How to Use Them (17 minutes)

Doug LaFluer, EIDEX

What are the top five school district data points you need to monitor, and what do they tell you? Learn from an expert on data analysis on ways you can get ahead of the curve by watching the key data points to stay within the norms.

Understanding the Numbers Behind MPSERS Rates! (40 minutes)

John Karagoulis, DTMB

Reform of the retirement system has created new funding strategies and rate calculations. Gain a better understanding of the strategies, how the unfunded liability is being managed, and what that means to district rates now and in the future.

“What Do They Call About?” – Top Ten Calls to MASB Legal (46 minutes)

Brad Banasik, MASB

Do you ever wonder what topics board members want more information on from a legal perspective? Join Brad as he counts down the “Top Ten” issues he receives calls on and how your understanding of the issues may help you at the board table.

Credit:

SCECHs 0.25-13 Pending approval

CPEs

*A & A – 2

**Ethics – 1

Other – 12.3