



Michigan School Business Officials

## MSBO School Finance Services Committee Up North Workshop Agenda

### Lakeside Resort and Conference Center Houghton Lake, MI

100 Clearview Dr., Houghton Lake, MI 48629

#### Thursday, October 9, 2025

- 6:00 pm **Reception** – Roscommon Room  
*Sponsored by: American Fidelity; Kingscott Associates, Inc.; Plante Moran; Stifel, Nicolaus & Company, Inc.*
- 7:00 pm **Dinner** – Roscommon Room
- 8:00 pm **Hospitality** – Roscommon Room  
*Sponsored by: Corebridge Financial*

#### Friday, October 10, 2025

- Officers: **Mark Mesbergen**, Chairperson, Fruitport Community Schools  
**Anna Wamack**, Vice Chair, Secretary, Midland Public Schools  
**Devin Kling**, Secretary, Northville Public Schools  
**Rachelle Roby**, Officer Elect, Coldwater Community Schools  
**Michael Klosowski**, Past-Chairperson, Elkton-Pigeon-Bay Port Laker Schools
- 7:30 am **Breakfast Buffet** – Roscommon Room  
*Sponsored by: MILAF+/PFM Asset Management and PFM Financial Advisors, LLC*
- 8:00 am **Welcome and Call to Order** — *Mark Mesbergen, Chairperson*  
**Introduce the FY2025-26 Slate of Officers** (*previously approved in June 2025*)
- 8:10 am **Legislative Update** — *David Ladd, Kelley Cawthorne*
- 9:00 am **ORS Update** — *Patrick Guysky, Emma Mann, and Angela Sanborn, DTMB-ORS*
- 9:30 am **MSBO Update** — *Robert K. Dwan and Jason R. Helsen, MSBO*
- 9:45 am **Break**
- 10:00 am **Economic Update and District Debt Planning** — *Sean Wahl, PFM Financial Advisors and Jeff Zylstra, Stifel, Nicolaus & Company, Inc.*
- 10:30 am **State and Federal Budget and Grants Update** — *Kevin Walters, MDE*
- 11:15 am **Accounting and Auditing Update\*** — *Eric V. Formberg, Plante Moran (retired partner)*
- 12:00 pm **Roundtable, Wrap-Up, and Review** — *Mark Mesbergen, Chairperson*  
**FY2025-26 MSBO School Finance Committee Calendar and Topics**
- 12:15 pm **Adjourn**

Next Meeting: November 21, 2025, 9:30 am - Zoom