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.
The MSBO Board of Directors is a non-paid board consisting 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**

**2012-13 President**
Angie McArthur, CFO
Superintendent
Engadine Consolidated Schools

**2012-13 President-Elect**
Mary A. Reynolds, CPA, CFO
Executive Director, Business Services
Farmington Public Schools

**2012-13 Immediate Past President**
Jeffrey P. Crouse, CFO
Assistant Superintendent
Charlevoix-Emmet ISD

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

**Directors**

Steve Ezikian
Deputy Superintendent
Wayne RESA

J. Thomas Goodwin, CFO
Chief Financial Officer
Grand Ledge Public Schools

Mike Hagerty, CFO
Assistant Superintendent
Administrative Services
Kent ISD

Tamera L. Powers, CFO
Director of Finance & ESSA Human Resources
Kenowa Hills Public Schools

Daniel B. Romzek, CPA, CFO
Assistant Superintendent, Business
Rochester Community Schools

Cheryl S. Wald, CPA, CFO
Financial Services Supervisor
Howell Public Schools

**Associate Member Representative**
Brenda Voutyras
Senior Vice President
Stifel, Nicolaus & Company, Incorporated
2012-13 Regional Presidents

**Allegan County**
Robert J. Hennip, CFO
Hopkins Public Schools

**Berrien/Cass/Van Buren**
Tracy L. Althouse, CPA
Lakeshore Public Schools

**Central Michigan**
Robert Spagnuolo, CPA, BOM
DeWitt Public Schools

**Genesee Area**
Leslie L. Young, CFO
Davidson Community Schools

**Grand Valley**
Stacey L. Wykoski, CFO
Jenison Public Schools

**Macomb/St. Clair County**
Tina Mills, CFO
Warren Consolidated Schools

**Middle Michigan**
Kevin Kolb, CFO
Shepherd Public Schools

**Monroe/Lenawee**
Wendy Rokita, CFO
Addison Community Schools

**Mid-West Michigan**
John Gilchrist
Greenville Public Schools

**Northern Michigan**
Rod Fullerton
Onaway Area Schools

**Northwest Michigan**
Tom Armstrong, CFO
Wexford-Missaukee ISD

**Oakland County**
William Holbrook, CPA
Waterford School District

**Saginaw Valley**
Dawn C. Bennett, CFO
Bridgeport-Spaulding Schools

**South Central**
Angena Morris, CFO
Calhoun ISD

**Southwestern**
Barbara A. Khaja, CFO
Paw Paw Public Schools

**Thumb Region**
Gail Denton
Sanilac ISD

**Upper Peninsula**
Deanna Mayer, CPA
Eastern Upper Peninsula ISD

**Washtenaw/Livingston**
Sharon Raschke, CFO
Dexter Community Schools

**Wayne County**
Sandra Gutenschwager, CPA, CFO
Melvindale-Northern Allen Park Schools

**Western Area**
Kimberly R. Hansen, CFO
Jenison Public Schools

2012-13 Program & Research/Administrative Committee Chairs

**Facilities Management**
Jeff Miller, CFD
Custodial Supervisor
Kent ISD

**Food Service**
Julie Harsh
Food Service Director
Saline Area Schools

**Intermediate School District**
Tamara Chaffee, CPA, CFO
Business Manager
Clare-Gladwin RESD

**Professional Development**
Suzanne M. Milton, RSBO, CFO
Finance/Business Operations Dir.
Eastern Upper Peninsula ISD

**School Finance Services**
Kevin J. Kolb, CFO
Asst. Supt., Finance/Personnel
Shepherd Public Schools

**Technology**
David Palme, STM
Technology Director
Portland Public Schools

**Transportation**
Tom Moore, CTD
Transportation Director
Washtenaw ISD

**Bylaws and Resolutions**
Marc Faber, CFO
Chief Financial Officer
Byron Center Public Schools

**Elections**
Diane Warren, RSBO
Finance Director
Shiawassee RESD

**Member Involvement**

Total 2012-13 membership includes Active and Associate Members in the following categories:

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

- **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 569 Associate Members.

<table>
<thead>
<tr>
<th>Category</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Finance</td>
<td>1,222</td>
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<tr>
<td>Facilities</td>
<td>268</td>
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<tr>
<td>Food Service</td>
<td>73</td>
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<tr>
<td>Human Resources</td>
<td>92</td>
</tr>
<tr>
<td>Public Safety</td>
<td>3</td>
</tr>
<tr>
<td>Purchasing</td>
<td>23</td>
</tr>
<tr>
<td>Superintendent</td>
<td>69</td>
</tr>
<tr>
<td>Technology</td>
<td>110</td>
</tr>
<tr>
<td>Transportation</td>
<td>233</td>
</tr>
<tr>
<td>Total Active Members</td>
<td>2,093</td>
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</tbody>
</table>
### MSBO Voluntary Certification

MSBO certification is a voluntary system, established in 1998. It provides focused training to school business officials in order to:

- Offer practical information that will help school business officials succeed and excel in their employment; and,
- Establish a basis for advancing professionalism of school business officials and assuring school districts that current or prospective business officials have a base of knowledge about laws, regulations, and procedures for functioning in a Michigan school district.

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 tracks.

Through the years, more than 1,800 members have earned a MSBO Voluntary Certification Award.

<table>
<thead>
<tr>
<th>Certification Track</th>
<th>Awarded 2012-13</th>
<th>Total Certified</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chief Financial Officer (CFO)</td>
<td>27</td>
<td>344</td>
</tr>
<tr>
<td>Certified Facilities Director (CFD)</td>
<td>13</td>
<td>115</td>
</tr>
<tr>
<td>Business Office Manager (BOM)</td>
<td>14</td>
<td>133</td>
</tr>
<tr>
<td>Business Office Specialist (BOS)</td>
<td>14</td>
<td>92</td>
</tr>
<tr>
<td>Certified Child Nutrition Director (CFS)</td>
<td>2</td>
<td>26</td>
</tr>
<tr>
<td>Certified Operations Director (COD)</td>
<td>15</td>
<td>16</td>
</tr>
<tr>
<td>Certified Purchasing Officer (CPO):*</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Certified Transportation Director (CTD)</td>
<td>8</td>
<td>57</td>
</tr>
<tr>
<td>Educational Data Specialist (EDS):*</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Human Resource Specialist (HRS)</td>
<td>5</td>
<td>64</td>
</tr>
<tr>
<td>Pupil Accounting Auditor (PAA)</td>
<td>10</td>
<td>34</td>
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<tr>
<td>Pupil Accounting Specialist (PAS)</td>
<td>19</td>
<td>74</td>
</tr>
<tr>
<td>School Payroll Specialist (SPS)</td>
<td>8</td>
<td>64</td>
</tr>
<tr>
<td>School Technology Management (STM)</td>
<td>9</td>
<td>78</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>144</strong></td>
<td><strong>1,097</strong></td>
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</tbody>
</table>

* Approved by the MSBO Board of Directors in early 2013.
One of MSBO’s roles is to advocate for membership and serve in an expert capacity whether it be providing testimony at a Senate or House legislative committee or working with a state stakeholders group that is addressing education and school administration policy.

MSBO staff represented MSBO members and the school community at a number of state agencies, department stakeholders groups and various other organizations, providing expert input on numerous issues to address the needs of MSBO members and K-12 education as a whole.

**Legislative Advocacy**

MSBO has represented members by providing expert testimony at a number of Michigan Senate and Michigan House of Representatives committee meetings addressing the need for school districts to maintain a healthy fund balance, transparency reporting, the economic cliff that many school districts are facing in the state, as well as a number of other issues affecting schools in Michigan.

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.

**Education Alliance**

MSBO participates with a score of other education associations dedicated to the exchange of ideas. The Education Alliance takes a leadership role in developing education policy recommendations to improve Michigan education.

**SNAM**

The MSBO Board of Directors approved a management partnership between MSBO and the School Nutrition Association of Michigan (SNAM) in early 2013. MSBO provides administrative services, leadership assistance and office space to SNAM. SNAM and MSBO have been closely affiliated for many years serving similar memberships and both organizations feel that this partnership will further enhance the relationship, benefiting both MSBO and SNAM members. Both organizations share a mission of promoting efficient and effective performance in school operations.
The 75th Annual Conference & Exhibit Show: The 2013 Annual Conference was held at the Amway Grand Hotel in Grand Rapids. Pre-Conferences this year included: Facilities, Food and Nutritional Services, Issues Facing the Business Manager, Transportation, and the addition of a Technology Pre-Conference. State Superintendent Michael Flanagan who talked about “A View from the Top” led the Opening General Session. The Keynote speaker was motivational speaker and former NFL quarterback Tom Flick who talked about what it means to be an effective leader. It was a recording breaking attendance as MSBO members celebrated the 75th Annual Conference!

Business Manager/CPA Workshop: This workshop provides timely information for practicing CPAs and business managers in preparing for successful year-end and financial statement preparation. Important topics range from reporting issues and concerns from the state’s audit reviews to key compliance and finance-related issues.

Introduction to School Business: This two-day conference is designed for new business officials (within the first few years of employment), office staff, and those who want a basic information refresher. Attendees get an understanding of the major functions of school business officials, how to survive the personal and professional politics of the job, and learn how the Michigan Department of Education and the Michigan Legislature affect education among many other topics.

Group Solutions-Current Issues: This workshop provides hands-on business office self-assessment, discussion and real-world problem solving. Attendees get straight talk, advice, and professional support from other professionals facing the same issues.

MDE/MSBO Workshop: This one-day workshop highlights the latest from the Michigan Department of Education on state aid, provides members the opportunity to meet with MDE staff, and other hot topics.

MSBO Leadership Institute: The MSBO Leadership Institute is designed to help members reach that next level in their professional and personal life through a rigorous and challenging curriculum that will help them grow as leaders and implement solutions. It includes face-to-face group sessions focusing on specific leadership themes, individual personal coaching sessions, and small group project sessions. The first cohort was held 2012-13 with 23 participants.

Financial Strategies Conference: This conference focuses on providing members the latest information on the economy, budget, state aid, legislation and other hot topics just in time for budgeting and negotiations.

HERA Training: These courses are a refresher designed for certification and licensing of asbestos abatement project designers through an Environmental Protection Agency (EPA) approved training program.

Annual Facilities/Operations Director Conference & Expo: This conference is the best place to access high-level information on school facilities. School facilities represent a tremendous resource and responsibility for districts and require the knowledge and understanding of a myriad of issues.
**Financial Review**

**Revenues by Category**

- Dues: $290,380
- Workshops and Conferences: 1,149,934
- Products and Services: 875,914
- Interest: 11,264
- Other: 18,721
- **Total**: $2,346,213

**Expenses by Category**

- Staffing – General Member Services: 36%
- Staffing – MIEM: 13%
- Staffing – Workshops and Product Support: 9%
- Workshop and Conference Expenses: 25%
- Products and Services: 2%
- Professional Fees: 7%
- Operational Costs: 8%
- **Total**: $2,167,545

**Balance Sheet**

**Assets:**

- Current Assets: $2,584,903
- Furniture and Equipment: 108,038
- Investment in MIEM: 40,812
- Investment in MELG: 797,185
- **Total Assets**: $3,530,938

**Liabilities and Net Assets:**

- Current Liabilities: $219,905
- Net Assets:
  - Designated: 1,489,818
  - Other: 1,821,215
- **Total Liabilities and Net Assets**: $3,530,938

The Financial Review Committee met on September 10, 2013. The Committee is comprised of:

- Robert Spagnuolo, DeWitt Public Schools (2013-14 Chair)
- Paul Bodiya, Macomb ISD
- Brian Marcel, Washtenaw ISD

Also in attendance were Board member Dan Romzek, Rochester Community Schools; MSBO Executive Director David Martell; MSBO Associate Executive Director Robert Dwan; MSBO Accountant Patty Lenneman and Tadd Harburn from Plante & Moran, PLLC.

The annual MSBO audit was conducted by Plante & Moran, PLLC and MSBO received a clean audit opinion. The Financial Review Committee voted to approve the report and recommended the Board accept the audit report. The MSBO Board accepted the audit report at their September 2013 meeting.
Business Solutions

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 nearly 6,000 school business management professionals as members.

BidSync
This secure, automated, web-based bidding system allows schools to manage all competitive and other procurement processes online. BidSync represents a major opportunity for schools to save time and money.

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 MASB (Michigan Association of School Boards) as well as MASA (Michigan Association of School Administrators). 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.

Custodial Certification Program
MSBO has developed a Custodial Certificate Program (CCP) to assist districts in providing meaningful, rigorous training to custodians that is designed to help improve performance and increase employee morale. The program is delivered on site and consists of 10 courses taught by experts.

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.

Fee-for-Service Consulting
MSBO offers a variety of consulting services. Services are customized to fit the needs of our members/clients. Consulting services analyze and improve business operations and provide useful information to school managers. Typical services offered: customized consulting and reviews of custodial, maintenance, and grounds operations, and all aspects of food service, including operational reviews, logistics and workflow, and staffing studies.

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 475 school districts and other public entities participate in this program.

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

MSBO/MAPT Bus Program
This joint venture with MAPT 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
Munetrix School Edition
Munetrix is a fiscal transparency solution that has the ability to use financial information submitted to the Michigan Department of Education (MDE) to determine cost effective and best practice models to independently and accurately determine the “fiscal health” of a school district to share with their community.

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.

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, audience for buses, equipment and anything else school districts may wish to sell.

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 6th year was another great success for the program with districts earning approximately $490,000 in rebates for the calendar year 2012.

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 120 online programs and 40 more being planned, SafeSchools offers a tremendous value to districts.

SchoolDude.com, Inc.
SchoolDude 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. SchoolDude’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.

School Finance Reference Manual
This easy-to-use-reference manual provides a collection of school finance materials needed by all school business officials. It is designed to help individuals understand the complexity of school finance issues. Each year it is updated to reflect the latest information on school finance.

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.
The core values of our association are:

- **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.