

SWMSBO Session Descriptions 2020

Room	Area	Presenter	Topic	Description
Session #1 8:30-9:30				
204	All	Rhonda Jones, Health Promotion Consultant - MESSA	Mindfulness, Movement & Nutrition: Keys to Wellness for You and Your Workplace	Work stress is continually on the rise. High levels of stress negatively impact health, well-being, productivity and morale. Learn strategies and tips that can improve your own health while creating a work culture that supports health and wellness.
205	BOM	Mike Steinbrook, Director - PFM Asset Management LLC	Arbitrage Rebate... It's Back	This session will educate participants on the complex requirements related to issuing tax-exempt bonds including school building bonds and state aid notes. Topics will include the arbitrage rebate and yield restriction rules, exceptions and strategies to maximize retained earnings, proactive tax planning, and post issuance compliance considerations. With continued low borrowing rates, there is increased potential to earn positive arbitrage, so ongoing arbitrage monitoring is very important.
208	BOM	Bill Disch, Rick Lobin, Kevin Kaplan - National Insurance Services (NIS)	Alternative Ways to Hold Medical Costs in Check	Discussion & Information regarding alternative ways to keep health costs in check.
209	All	Ryan Miller, Academic Data Specialist - Portage Public Schools	Google Drive - The Basics and Beyond	This session will provide a detailed overview of how to best utilize Google Drive. We'll cover organization, creating folders, sharing files, setting file permissions, search tips to find the files in your drive and items that have been shared with you, as well as many time-saving, next-level Google Tips & Tricks.
210	HR	Jeni Opel, Human Resources Coordinator & Melinda Nelson, Human Resources Generalist - KRESA	HR - Inspiring a Better Workplace	Ways to inspire a better workplace to engage employees and create a happier, more productive work environment. Reviewing procedures and programs to enhance employee job satisfaction and increase retention.
211	HR, P/R	Aliceson Milanowski - Williams & Company	Retirement Education & Preparation	Educating employees about the complexities of MPERS and retirement planning.
212	BOM	Anthony E. Meyaard, Michigan Master Assessing Officer - Van Buren County Equalization Office	Understanding the 4029 Tax Rate Request Form	This session will help to get a better understanding of the 4029 form and the truth in taxation requirements that go along with it.
213	BOM, Purch	Jeremy S. Motz, Attorney - Clark Hill	Effective Management of Procurements in Purchasing and Construction	This session will provide an overview of the laws which govern procurements in purchasing and construction in Michigan Schools with a focus on practical application of the same. Attendees will review the procurement process (RFP) along with other aspects of contracts.
242	BOM	Philip Boone, Assistant Director & Christopher May, Financial Specialist - MDE	State Aid & School Finance Update (2 sessions)	Get the latest information on state aid and school finance in Michigan. Topics covered will include accounting and financial reporting updates, the State School Aid Budget, and other current topics. There will also be plenty of time for questions and answers.
105	BOM	Jeffrey Staley, Partner & Bill Tucker, Partner - Maner Costerisan	GASB 84 & 87 Update	A look at GASB 84 and how it will look in your district's financial statements, as well as discuss GASB 87 (Leases) and what you can do now so you are prepared.
107	New BOM	Rob Burgess, Past President MSBO & Alex Schaeffer, Partner - Kruggel Lawton CPAs	Michigan School Accounting: The Basics (2 sessions)	Encore presentation of Michigan school accounting basics to assist you in getting your district's budget & annual audit report in line. Geared for the business manager new to school accounting or the business office staff who primarily have other duties but who assist in budget analysis or preparation for the annual audit.
Session #2 9:35-10:35				
204	All	Brian Schupbach, Assistant Superintendent of Technology - KRESA	Cyber Security for the K12 Business Office and HR	According to Plante Moran, there is a 27% chance your district will experience a data breach over the next two years. Ransomware is also shutting down schools and costing districts millions of dollars. Join this session to learn about the various cyber threats hitting districts in Michigan as well as some simple steps you can take to defend your district's data and reputation
205	BOM	Michael Evrard, CPA, Senior Manager - Yeo & Yeo	The MD&A - Who Really Cares, and How to Make Yours Meaningful	This session is designed to demonstrate the purpose of the MD&A and required elements, in addition to the types of analysis and narratives that should be present each year. We will discourage using a 'template' that typically lacks meaningful analysis. Examples of excellent elements of the MD&A will be shown in addition to elements that should be revamped.
208	BOM	Jennifer Smith, Director of Government Relations - MASB	Legislative Update (2 sessions)	An update on what's happening at the Capitol, the Governor's latest budget proposal, and what to look forward to this election year.
209	All	Ryan Miller, Academic Data Specialist - Portage Public Schools	Google Forms, Sheets, & Autocrat... Oh My!	You probably know that Google forms can collect data for you, and that data "lives" in a Google spreadsheet, but did you know that you can automatically create Google Docs and Google Slides with that data by using a FREE Add-on named Autocrat?
210	HR, P/R	Bobby Hoppes, Lead Analyst & Josey McCloud, Lead Analyst - ORS	Public School Employee Retirement Experience (2 sessions)	Learn how Reporting Units, ORS, and Voya Financial affect employees at different phases of their careers.
211	HR, P/R	Heidi Schiller, Assistant Vice President & Michael Bronson, Financial Advisor - VOYA	Michigan Public School Employees: New Employee Orientation	This interactive presentation describes the State of Michigan 401k and 457 plans, Pension Plus 2 and Defined Contribution retirement plan options available to new public school employees. We'll discuss the importance of understanding the options and making the decision by the deadline. Bring questions you hear most often from new hires, and get answers on the spot.

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212	BOM	Raymond M. Davis, Shareholder - Thrun Law	Pitfalls & Interrelationships between Policies, Master Agreements & the Law	Discover pitfalls between Master Agreements and Policies; learn how to assure Master Agreement provisions comply with law, and learn the interrelationship between Master Agreements, policies, and the law.
213	BOM	Paul Wills, Partner & Nicole Blocker, Senior Consultant - Plante Moran	Secrets to a Successful Bond Program: Overcome obstacles by starting out on the right foot	Your district has an exciting strategic educational plan, and you feel ready for the next few years of shaping the learning environment. But do your facilities align with your vision? Districts often consider bond programs to help provide funding for facility renovations and upgrades that help support their long-term goals. This session will provide an "all-things-considered" point of view from capital program and bond planning experts with actionable insights for your district as you embark upon your bond planning journey.
242	BOM	Philip Boone, Assistant Director & Christopher May, Financial Specialist - MDE	State Aid & School Finance Update (2 sessions)	Get the latest information on state aid and school finance in Michigan. Topics covered will include accounting and financial reporting updates, the State School Aid Budget, and other current topics. There will also be plenty of time for questions and answers.
105	BOM	Heather Menzies, Account Executive & Darci Muller, Account Executive - SET SEG	Insurance & Risk Management Update	Join us to learn the basics of protecting your district and finding the proper risk management solutions for your employees and facilities. Our experts will share the importance of finding the proper coverage, best practice loss control strategies, and how to handle Employee Benefit compliance. Don't wait to find out about cyber security or Affordable Care Act compliance until it's too late! This session is a can't miss for anyone involved with their district's risk management strategy.
107	New BOM	Rob Burgess, Past President MSBO & Alex Schaeffer, Partner - Kruggel Lawton CPAs	Michigan School Accounting: The Basics (2 sessions)	Encore presentation of Michigan school accounting basics to assist you in getting your district's budget & annual audit report in line. Geared for the business manager new to school accounting or the business office staff who primarily have other duties but who assist in budget analysis or preparation for the annual audit.
Session #3 11:20-12:20				
204	All	Tim Raymer, Former Business Official - Raymer Consulting	Effective Management of the Knowns and Unknowns	Business officials face many challenges. Some are predictable and can be planned for, while others can disrupt everything. Learn how to develop effective systems for dealing with the knowns and unknowns.
205	BOM, Purch	Carol Partridge, CPA - Yeo & Yeo	Sales Tax - Who do I owe?	Determine your obligations for sales tax and use tax. When do I need to pay, what is subject to tax, and who do I owe? When do you have obligations to other states? Get your sales tax questions answered in this session.
208	BOM	Jennifer Smith, Director of Government Relations - MASB	Legislative Update (2 sessions)	An update on what's happening at the Capitol, the Governor's latest budget proposal, and what to look forward to this election year.
209	All	Dr. Ed Orloff - Ivy Rehab Physical Therapy	Headaches, or Just Another Pain in the Neck?	Headaches are common, and there are many causes. In this session you will learn about the most common types and effective self treatment strategies for managing them.
210	HR, P/R	Bobby Hoppes, Lead Analyst & Josey McCloud, Lead Analyst - ORS	Public School Employee Retirement Experience (2 sessions)	Learn how Reporting Units, ORS, and Voya Financial affect employees at different phases of their careers.
211	HR	Josh DeBradander, Data Collections Analyst - CEPI	REP - What It's All About	This session will include an overview of the REP application an submission, including collection changes for the 19/20 school year, the data submission process, data certification, Educator Effectiveness Appeals process, REP On-Demand, the TSDL connection, REP Data Quality, and an overview of REP reports.
213	BOM	Paul Wills, Partner & Nicole Blocker, Senior Consultant - Plante Moran	Too Many Students or Not the Right Space?: Understanding your facility utilization	As capital program experts, we often meet with districts who fear their schools are over capacity or that classrooms are too packed to support engaged learning. Sometimes this is true. However, we frequently find that the problem isn't that there are too many students, it's that districts are not using the space they have efficiently. During this session, we will provide you with case studies and benchmarking that will allow you to assess your space and help your students thrive academically.
242	BOM	Katerina M. Vujea, Attorney & Ryan J. Nicholson, Attorney - Thrun Law	Student Activity Funds & Booster Clubs: Impact of GASB 84	GASB 84 has changed the landscape with accounting regarding Student Activity Funds and Booster Clubs. Learn the new legal requirements and tricks for compliance.
105	BOM, HR	Lisa M. Stevens, Account Development Coordinator - American Fidelity	125 Compliance Challenges - Building a Strong Foundation	As more and more employers offer more than one health plan design and multiple medical savings tools, there are a lot of nuances that cause confusion and questions from both the Finance/HR administrators & employees. In this presentation, we will go over the basics of what a Section 125 Plan is, review tax savings tools under IRS Section 125, and then dive into some common compliance mistakes organizations can make.
107	BOM, Purch	Dave Martell, Executive Director - MSBO & Beth Smith, Senior Managing Consultant - PFM	Maximize the Value of Your District Purchase Card Program	Implementation of a P-Card system as a best practice is a smart decision for your district. Hear from MSBO and the MSBO sponsored P-Card administrator on how you can benefit from fully implementing/integrating your program to maximize savings in time and effort in your operations. We will provide specific guidance on how to implement and monitor our P-Card program and offer visual samples of online access and reporting that districts use to manage their accounts. We will also describe the options in card program set-up, department accounts, declining balance, individual cards, ACH payment timing and other options available to customize your cards and program.