Greetings!

As you look through MSBO’s 82nd Annual Conference & Exhibit Show brochure, you will see many learning opportunities. Session topics are aimed at all levels of school management experience from those just starting out to veterans.

MSBO believes this is the best professional development value available to school management professionals. Don’t miss this opportunity to take advantage of all the conference has to offer — special ½ day workshops, more than 150 breakout sessions, pre-conferences, and certification classes as well as the largest “education” exhibit show in Michigan.

On behalf of the MSBO Board of Directors, I invite you to join us at the 82nd MSBO Annual Conference & Exhibit Show.

Thomas L. Armstrong, CPA, CFO, MSBO President
Director of Business and Operations, Fulton Schools

MSBO Mission Statement
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.

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General Conference Information

Attire
Both business and business casual are acceptable for all meetings and events. We recommend using the “layered method” to give you flexibility to adjust to the room temperatures.

Registration
Register online: www.msbo.org or send your completed registration form to:
MSBO, 1001 Centennial Way, Suite 200
Lansing, MI 48917 or fax to: 517/327-0768
All conference registrants will receive an email confirmation after registering. All conference and pre-conference meal tickets are provided with your registration. Registration fee includes breakfast and lunch.

Registration Hours at Amway Grand Plaza Hotel:
Monday, April 20: 5:00 – 7:00 pm
Tuesday, April 21: 7:00 am – 7:00 pm
Wednesday, April 22: 7:00 am – 5:00 pm
Thursday, April 23: 7:00 am – 3:30 pm

Questions?
Call 517/327-5920 or email: msbo@msbo.org

MSBO Mobile Web
The 2020 MSBO Annual Conference mobile site will allow you to access all the important conference information on your smart phone, iPad, computer and tablet. The mobile site will be available prior to and during the Conference. A link to the mobile site including clinic handouts* will be sent to attendees prior to the Conference.

*Except where a speaker has not given us permission or has not yet provided to us.

Pre-Conferences Include:
- Facilities
- Finance
- Food and Nutrition Services
- Human Resources
- New Business Manager
- Technology
- Transportation

MSBO Annual Conference Headquarters Hotel
Amway Grand Plaza Hotel
187 Monroe Ave. NW
Grand Rapids, MI 49503

Lodging
The headquarters hotel is full. For alternative hotels, please check the MSBO website, www.msbo.org.

Parking
Amway Grand Plaza Hotel Parking: $32 per day self-park or $35 per day valet (subject to change). Both allow 24-hour in and out access. Valet parking is located in the motor lobby off of the Pearl Street entrance. Self-parking is available in the Amway Grand Parking Ramp. The Amway Grand Parking Ramp entrance is located on the corner of Pearl Street and Monroe Avenue with entrances on Campau and Pearl Streets.

State Continuing Education Clock Hours (SCECHs)
Under MDE regulations, SCECHs are given based on your attendance at Pre-Conference, Half-Day Workshops, Certification classes, Exhibit Show, and Conference sessions. SCECHs are given pending final approval from MDE.

Prizes & Giveaways
“Early Birds” Get the Prizes
If you register by 3/15/20 you are automatically eligible for the Early Bird Prizes. Winners will be noted in individual exhibitor booths.

Exhibitor Drawings
On Thursday, participating exhibitors draw for prizes from business cards collected in their booths. Winners will be displayed on a centrally located bulletin board.

Closing Session Drawings
Prizes, such as overnight stays at MSBO event hotels, will excite and entice you to stay for this year’s MSBO Annual Business Meeting of the 82nd Annual Conference.

Auditing and Accounting CPE: 150e; 170f; 191; B10; C12; E10; E12; E13; F08; F09; F12; i19; J09
Ethics CPE: B14; G01

CPEs

Exhibits
We are proud to have the largest educational exhibit show in Michigan. Your attendance at the Exhibit Show benefits you and helps assure value to the exhibitors who support the Conference. Visit more than 300 exhibit booths displaying a wide variety of products and services used by schools. The exhibit hall is located at DeVos Place and is open:

Wednesday, April 22: 2:30 – 5:00 pm
Thursday, April 23: 11:00 am – 1:00 pm
Sessions by Category

**Facilities**
- 110 — Facilities Pre-Conference
- B05 — Environmental Compliance is Critical
- B06 — Shining the Light on Solar Projects
- C05 — Effective Facility Use Protocols
- C06 — Security as a System
- E03 — Construction Projects: Clarifying Widespread Misunderstandings about Laws and Procedures
- E04 — School Security and Access Control Considerations
- F03 — Facilities Hot Topics Round Table
- F04 — Leverage Your Work Order System
- i06 — Retro-Commissioning Can Bring Big Savings
- i07 — Keys to Good Key Control
- J06 — The Great Flooring Debate
- J07 — Understanding the Math of Solar Energy

**Finance (Continued)**
- C09 — Cash Flow and Short-Term Borrowing Options
- C10 — CHAMPS Facility Settlement Subsystem Update
- C11 — Balanced Calendar (Year-Round School) and the Effect on the Business Office
- C12 — GASB 84 and Strategies to Comply
- C13 — Special Education Finance for the Business Manager
- C14 — Legislative Update
- C15 — Consolidated Application Grants and the Business Manager
- C16 — Bond Issuance 101
- E05 — Dissecting Your Bank Analysis Statement
- E06 — Capital Project Funding Options: Avenues for Operational Cost Savings
- E07 — MDE Potpourri
- E08 — Online Payment Solutions
- E09 — Establishing a School Foundation Under IRC 501(c)(3)
- E10 — Understanding and Preparing for Your Annual Audit
- E11 — The Profit and Pitfalls of Shared Time Arrangements with Nonpublic Schools
- E12 — Accounting and Auditing Update
- E13 — Grants Management 101
- E14 — Board and Superintendent Communication
- F05 — PTO and Booster Groups: On or Off the Districts’ Books?
- F06 — Building Community Through Bond Projects: An Overview of the Process and Roles
- F07 — CTE Reporting and Spending
- F08 — Subrecipient Monitoring & Collaboration Under Uniform Grant Guidance
- F09 — The ABC’s of Federal Program Compliance and Accounting Along with Preparing for Your Audit
- F10 — Understanding the Headlee Rollback and Effective Millage Proposal Strategies

**Finance (Continued)**
- F11 — Indirect Costs
- F12 — Your Financials and Lease Agreements!
- F13 — MPSERS and Other Retirement Complexities
- F14 — MiDEAL: An All Access Pass to Michigan Contracts
- H03 — Medicaid 101, Expansion, and 31n Grant
- H04 — Special Education: Hands On!
- H05 — MSBO BMA: Mini Session
- I08 — Let’s Talk About the MMC Graduation Requirements and the Personal Curriculum (PC) Flexibility.
- I09 — MSBO Dynamic Budget Projections Software
- I21 — Data Privacy and Security
- J08 — Structuring Debt for Future Flexibility
- J09 — Bulletin 1022 Accounting Manual for New Business Managers
- J15 — Wilkes University
- J21 — At-Risk Funding Changes

**Food and Nutrition Services**
- 120 — Food & Nutrition Services Pre-Conference
- B17 — Managing Your Food Service Management Partnership
- C17 — Critical Food Service Budget Metrics
- E15 — Adverse Childhood Experiences and the Whole Child Health and Well-Being
- F15 — Food As Medicine
- I10 — Food Service Data Dashboards
- J10 — Food and Nutrition Services Hot Topics Round Table
## Sessions by Category

### General
- 199 — Interpreting Communication Styles
- B14 — Behavioral Ethics: Impact on Internal Controls
- B18 — Ain't Nobody Got Time for That!
- B19 — Document Retention in the Electronic Age
- C18 — A Seat at the Table: Leveraging Your Expertise as a Business Official to Empower Change in Your School
- C19 — Legal Update
- E16 — Excel for Smarty's: Intermediate
- E17 — CBD, Medical Cannabis, and Vaping: What School Officials Need to Know!
- F16 — Effectively Managing Contracted Service Arrangements
- H06 — Generations and Managing Staff with Different Personalities
- i11 — Your Guide to Compliance Training
- i12 — Succession Planning: Finding Qualified Employees
- J11 — 403(b)/457 Plans
- J12 — School Safety and Crisis Management

### Human Resources (Continued)

#### Human Resources
- H02 — Investigating Student and Workplace Sexual Harassment Claims
- i13 — Continuing Disclosure: Is Your District in Compliance?
- i14 — ORS Plans
- J13 — Arbitrage Rebate: Might Have to Pay Now!
- J14 — MDE/MASS ESW Update

#### Payroll
- 198 — Michigan Office of Retirement Services (ORS) Processor Workshop
- A04 — Payroll Processing and Legal Compliance
- F17 — Ways to Prepare for Open Enrollment
- F20 — Payroll Pitfalls

#### Pupil Accounting
- B21 — Pupil Accounting Fundamentals
- C21 — Enrollment Projections Done Right!
- E21 — Pupil Accounting for the Nontraditional Learning Environment
- F21 — Top 10 Reasons Why Your District Loses FTE/Foundation Allowance Revenue
- i16 — Legal Documentation of Student Records
- J16 — Proper Pupil Accounting for Special Education Students

#### Purchasing
- B22 — Writing a Proper RFP and the Rules to Follow
- C22 — Negotiating Contracts for Goods and Services
- E22 — Fundamentals of Purchasing Policies and Procedures
- F22 — Permissible Expenditures
- i17 — A Comparison of Leasing vs. Buying
- J17 — Get Control of Online Purchasing

### Technology
- 160 — Technology Pre-Conference
- B23 — Ransomware: The Threat is Real and It Happened to Us!
- B24 — Budgets for IT
- C23 — Essential Cybersecurity Practices for K-12
- C24 — Have You Been Asked About Data? Connect with the Michigan Data Hub
- E23 — The Law and Technology for School Officials
- E24 — The Basics of Implementing One-To-One Devices in Your District
- F23 — Maintaining One-to-One Technology: Lessons Learned
- F24 — Technology Director Roundtable: Workflow Management
- i18 — Get in the Know for Technology: Resources for Technology Directors
- i19 — IT Vendor Fraud
- J18 — MICIP: What is it and what’s my role?
- J19 — SEN: Internet Statewide

### Transportation
- 180 — Transportation Pre-Conference
- B25 — Managing Transportation Risks
- C25 — Do You Know Who’s Driving Your Buses?
- E25 — School Bus Construction
- F25 — Transportation Hot Topics Round Table
- i20 — Electrifying School Buses
- J20 — Lease or Own: Best Practices for Financing School Buses
Conference At-A-Glance

Monday, 4/20/2020
5:00 – 7:00 pm .......................... Registration

Tuesday, 4/21/2020
7:00 am .......................... Registration and Breakfast
8:30 am – 4:30 pm ........................ Pre-Conferences
110 — Facilities Pre-Conference
120 — Food & Nutrition Services Pre-Conference
130 — Human Resources Pre-Conference
150 — New Business Manager Pre-Conference
160 — Technology Pre-Conference
170 — Finance Pre-Conference
180 — Transportation Pre-Conference

8:30 – 11:45 am ........................ Certification Classes
190 — Cash Management
191 — Accounting Manual and Chart of Accounts
192 — Effective Communications
193 — Benefits/Retirement

1:15 – 4:30 pm ........................ Certification Classes
194 — Human Resources for the Business Manager
195 — Systems: HVAC, Electrical, and Technology
196 — Principles of Education
197 — Technology for the Business Manager

1:15 – 4:30 pm ........................ Half-Day Workshops
198 — Michigan Office of Retirement Services (ORS) Processor Workshop
199 — Interpreting Communication Styles

5:00 – 6:00 pm
Michigan Schools Energy Cooperative (MISEC) Annual Meeting
Upper Peninsula SBO Meeting

5:00 – 8:00 pm ........................ Past Presidents Reception and Dinner (Invitation Only)

Wednesday, 4/22/2020
6:00 – 7:00 am .......................... 201 — Yoga with Amanda
7:00 am .......................... Registration and Breakfast
8:00 – 9:00 am ........................ Opening General Session, Welcome, and Super Session: Dr. Michael F. Rice, State Superintendent
9:20 am – 12:20 pm ........................ Clinic Sessions A, Certification Classes
A01 — Time Management
A02 — Introduction to Facilities Management

9:20 – 11:40 am ........................ Clinic Sessions A
A03 — Collective Bargaining Basics
A04 — Payroll Processing and Legal Compliance
CONFERENCE AT-A-GLANCE

WEDNESDAY, 4/22/2020

9:20 – 10:20 am  Clinic Sessions B

B05 — Environmental Compliance is Critical
B06 — Shining the Light on Solar Projects
B07 — Basic Treasury Filing Requirements
B08 — Implementing and Growing a Purchasing Card Program
B09 — The Bond Passed: Now What?
B10 — Enhancing the Effectiveness of Your Districts’ MD&A
B11 — Analyzing Debt Refinancing Opportunities in Today’s Market
B12 — Learning How to Prevent Fraud: Districts Who Learned the Lessons the Hard Way
B13 — Bonds vs. Sinking Funds: Which Best Fits Your District?
B14 — Behavioral Ethics: Impact on Internal Controls
B15 — Benefits Administration 101
B16 — Banking and Investing
B17 — Managing Your Food Service Management Partnership
B18 — Ain’t Nobody Got Time for That!
B19 — Document Retention in the Electronic Age
B20 — The Opioid Epidemic: What Michigan Public Schools Should Know
B21 — Pupil Accounting Fundamentals
B22 — Writing a Proper RFP and the Rules to Follow
B23 — Ransomware: The Threat is Real and It Happened to Us!
B24 — Budgets for IT
B25 — Managing Transportation Risks

10:40 – 11:40 am  Clinic Sessions C

C05 — Effective Facility Use Protocols
C06 — Security as a System
C07 — Budget Timelines for ISD’s
C08 — Purchasing in an Online Marketplace
C09 — Cash Flow and Short-Term Borrowing Options
C10 — CHAMPS Facility Settlement Subsystem Update
C11 — Balanced Calendar (Year-Round School) and the Effect on the Business Office
C12 — GASB 84 and Strategies to Comply
C13 — Special Education Finance for the Business Manager
C14 — Legislative Update
C15 — Consolidated Application Grants and the Business Manager
C16 — Bond Issuance 101
C17 — Critical Food Service Budget Metrics
C18 — A Seat at the Table: Leveraging Your Expertise as a Business Official to Empower Change in Your School
C19 — Legal Update
C20 — Contractual Relationships with Retirees and Contractors
C21 — Enrollment Projections Done Right!
C22 — Negotiating Contracts for Goods and Services
C23 — Essential Cybersecurity Practices for K-12
C24 — Have You Been Asked About Data? Connect with the Michigan Data Hub
C25 — Do You Know Who’s Driving Your Buses?

12:00 – 1:30 pm  Lunch, Awards, and Business Meeting

1:30 – 2:30 pm  Keynote Presentation: Colonel Arthur J. Athens, USMC (Ret.)

2:30 – 5:00 pm  Exhibit Show

4:30 – 5:00 pm  2020-21 Incoming Regional Presidents and Committee Chairs Orientation (Invitation Only)

5:00 – 6:00 pm  Wayne County SBO Meeting

5:15 – 6:00 pm  Northern Michigan SBO Meeting

5:30 – 7:00 pm  MSBO Welcome Reception
Thursday, 4/23/2020

7:00 am ........................................ 29th Annual SET SEG Fun Run/Walk

7:00 am ........................................ Registration and Breakfast

8:20 – 11:20 am ............................... Clinic Sessions D, Certification Classes

D01 — Food Service Program Accountability
D02 — Introduction to Pupil Accounting I

8:20 – 9:20 am ............................... Clinic Sessions E

E01 — Construction Projects: Clarifying Widespread Misunderstandings about Laws and Procedures
E02 — School Security and Access Control Considerations
E03 — Dissecting Your Bank Analysis Statement
E04 — Capital Project Funding Options: Avenues for Operational Cost Savings
E05 — MDE Potpourri
E06 — Online Payment Solutions
E07 — Establishing a School Foundation Under IRC 501(c)(3)
E08 — Understanding and Preparing for Your Annual Audit
E09 — The Profit and Pitfalls of Shared Time Arrangements with Nonpublic Schools
E10 — Accounting and Auditing Update
E11 — Grants Management 101
E12 — Board and Superintendent Communication
E13 — Adverse Childhood Experiences and the Whole Child Health and Well-Being

9:40 – 10:40 am ............................... Clinic Sessions F

F01 — Facilities Hot Topics Round Table
F02 — Leverage Your Work Order System
F03 — PTO and Booster Groups: On or Off the Districts’ Books?
F04 — Building Community Through Bond Projects: An Overview of the Process and Roles
F05 — CTE Reporting and Spending
F06 — Subrecipient Monitoring & Collaboration Under Uniform Grant Guidance
F07 — The ABC’s of Federal Program Compliance and Accounting Along with Preparing for Your Audit
F08 — Understanding the Headlee Rollback and Effective Millage Proposal Strategies
F09 — Indirect Costs
F10 — Your Financials and Lease Agreements!
F11 — MPSERS and Other Retirement Complexities
F12 — MiDEAL: An All Access Pass to Michigan Contracts
F13 — Food As Medicine
F14 — Effectively Managing Contracted Service Arrangements
F15 — Ways to Prepare for Open Enrollment
F16 — Merit Pay: Where Are We Now?
F17 — Performance Evaluations: Giving and Receiving Constructive Feedback for Non-Instructional Staff
F18 — Payroll Pitfalls
F19 — Top 10 Reasons Why Your District Loses FTE/Foundation Allowance Revenue
F20 — Permissible Expenditures
F21 — Maintaining One-to-One Technology: Lessons Learned
Conference At-A-Glance

Thursday, 4/23/2020

9:40 – 10:40 am ............................... Clinic Sessions F (Continued)
F24 — Technology Director Roundtable: Workflow Management
F25 — Transportation Hot Topics Round Table

11:00 am – 1:00 pm .......................... Exhibit Show and Lunch (Served in exhibit hall)

12:30 – 2:30 pm ............................... G01 — Certification Wrap-Up/Ethics

1:15 – 2:30 pm ............................... Clinic Sessions H
H02 — Investigating Student and Workplace Sexual Harassment Claims
H03 — Medicaid 101, Expansion, and 31n Grant
H04 — Special Education: Hands On!

1:15 – 1:45 pm ............................... Clinic Sessions i
i06 — Retro-Commissioning Can Bring Big Savings
i07 — Keys to Good Key Control
i08 — Let’s Talk About the MMC Graduation Requirements and the Personal Curriculum (PC) Flexibility.
i09 — MSBO Dynamic Budget Projections Software
i10 — Food Service Data Dashboards
i11 — Your Guide to Compliance Training
i12 — Succession Planning: Finding Qualified Employees
i13 — Continuing Disclosure: Is Your District in Compliance?
i14 — ORS Plans
i16 — Legal Documentation of Student Records
i17 — A Comparison of Leasing vs. Buying
i18 — Get in the Know for Technology: Resources for Technology Directors
i19 — IT Vendor Fraud
i20 — Electrifying School Buses
i21 — Data Privacy and Security

2:00 – 2:30 pm ............................... Clinic Sessions J
J06 — The Great Flooring Debate
J07 — Understanding the Math of Solar Energy
J08 — Structuring Debt for Future Flexibility
J09 — Bulletin 1022 Accounting Manual for New Business Managers
J10 — Food and Nutrition Services Hot Topics Round Table
J11 — 403(b)/457 Plans
J12 — School Safety and Crisis Management
J13 — Arbitrage Rebate: Might Have to Pay Now!

2:45 – 4:00 pm ............................... Closing General Session, Business Meeting, and Prizes
## 110 — Facilities Pre-Conference • 8:30 am – 4:30 pm

### 8:30 – 9:00 AM

**110a — Don’t Leave Money on the Table**
If it saves a kilowatt of electricity or a cubic foot of gas, it most likely earns a rebate. Learn what specific rebates are available through your utility company, along with other initiatives for you to consider. You’ll also learn of various programs designed to assist districts in reducing energy and increasing awareness.

*Presenter(s): Mark Bates and Martin Morgan, Consumers Energy*

### 9:00 – 9:30 AM

**110b — Reorganizing Your Department**
Learn from a director who reorganized his maintenance department to be more efficient and effective. He did this with significant input from those affected, but also clearly communicated the goal, so everyone had the opportunity to contribute. Understand the process utilized so you can glean the pieces that may work in your operation.

*Presenter(s): Pete Muscio, Rochester Community Schools*

### 9:30 – 10:00 AM

**110c — Cybersecurity Applies to Facilities**
Facilities management has become increasingly reliant on technology. This happened gradually over time and now it’s time to review practices to keep facilities secure. Consider building management systems, access control, security systems, cameras — just to name a few areas that access the network. Learn what could happen if someone intentionally accessed these systems to do harm. Learn strategies to strengthen your cybersecurity protocols to keep your buildings safe.

*Presenter(s): David Larson, Livingston ESA*

### 10:00 – 10:15 AM

**10:00 – 10:15 AM**

**Break**

### 10:15 – 11:00 AM

**110d — Integrated Pest Management**
Are you prepared for an Integrated Pest Management (IPM) inspection by the state of Michigan? IPM remains a required program for schools to have in place. Having a strong program contributes to the safety of your staff and students. Inspectors are conducting inspections across the state. Learn how to ensure your program and practices comply with the rules.

*Presenter(s): Bob Stoddard, EnviroSafe, Inc.*

### 11:00 – 11:45 AM

**110e — Electrical Issues**
Electrical problems can easily cause challenges and disruptions at school districts. When electricity isn’t properly controlled, it can be very dangerous and costly. Learn best practices regarding electrical equipment maintenance and power surge protection and hear about real-world problems that have occurred and how they were handled.

*Presenter(s): Michael Grosso, SET SEG*

### 11:45 AM – 12:00 PM

**Break/Passing Time**

### 12:00 – 1:00 PM

**Lunch**

### 1:00 – 1:15 PM

**Break/Passing Time**

### 1:15 – 2:15 PM

**110f — Making Performance Evaluations Meaningful**
Most of us have experienced the torturous annual performance evaluation process. The time spent is often wasted on trying to remember what happened during the year and if any of it mattered. Too often this process is not helpful for anybody’s development or for making the school district better. Learn about an alternative approach that synchronizes employee growth and organizational improvement in a much more useful and productive process. This is a combined session with the technology directors.

*Presenter(s): Tom Platt, Decision Support Group*

### 2:15 – 2:30 PM

**Break**

### 2:30 – 4:30 PM

**110g — Amway Grand Plaza Hotel Technology and Security**
The lines between technology and facilities have blurred considerably as we recognize how more and more building systems, from climate control to access control, are all running over a network. Schools are not unique in this scenario. Hotels, for example, interact with multitudes of different customers every day, and much of that interaction is done digitally. They also have hundreds of spaces requiring climate control and security. How do they integrate their technology efforts with their facilities? Hear from the experts at the Amway Grand Plaza Hotel on how they approach these issues to ensure everything interfaces seamlessly. We’ll also take a tour and see where many of these operations take place. This is a combined session with the technology directors.

*Presenter(s): Russ Aubil and Michael Mosele, Amway Hotel Corporation*
8:30 – 9:30 AM
120a — Addressing Meal Debt
Meal debt is a national problem that doesn’t seem to have any easy solutions. No one wants to “lunch shame” a child, yet we have fiscal realities that make it hard to continually absorb the debt. Everyone is required to have a policy, but no standard practices have been identified. A recent School Nutrition Association (SNA) Meal Debt Committee consisting of school and state agency representatives came together to discuss this universal problem. Discover what ideas came forth from that meeting and join a discussion regarding how it’s impacting your Michigan school district.
Presenter(s): Diane Golzynski, MDE

9:30 – 10:15 AM
120b — MIOSHA
Learn about common violations and guidance for complying with the Michigan Occupational Safety & Health Administration (MIOSHA) regulations, specifically related to food preparation operations. Learn what to expect should your district be inspected.
Presenter(s): Robert Atkins, MIOSHA

10:15 – 10:30 AM
Break

10:30 – 11:00 AM
120c — Rules for Equipment Purchase
You must follow certain protocols before purchasing food service equipment with federal dollars. Understand the steps you need to take to ensure a proper purchase.
Presenter(s): Aimee Haapala and Brenda Sweatman, MDE

11:00 – 11:45 AM
120d — Now We’re Cooking with Gas
Gain a better understanding of equipment available in today’s industry, including what equipment works well in a food truck. Learn what efficiencies can be gained from newer equipment and what equipment changes are expected in the future.
Presenter(s): Steve Amos, HRI, Inc.

11:45 AM – 12:00 PM
Break/Passing Time

12:00 – 1:00 PM
Lunch

1:00 – 1:15 PM
Break/Passing Time
130 — Human Resources Pre-Conference • 8:30 am – 4:30 pm

8:30 – 9:30 AM

130a — Hot Topics in School Labor Law
Understand recent developments in law that affect public schools in Michigan, such as unions withdrawing from representing bargaining units due to a lack of dues-paying members.
Presenter(s): Kara T. Rozin, Clark Hill PLC

9:30 – 10:30 AM

130b — Compensation Classifications Update
The Department of Labor (DOL) issued new rules this year increasing the salary level that employees must meet to be classified as “exempt” under the Fair Labor Standards Act (FLSA). But properly classifying an employee as “exempt” or “non-exempt” goes beyond the salary level. Learn how to audit your school district’s compensation practices to ensure employees are properly classified under the FLSA to avoid claims.
Presenter(s): Philip G. Clark and Jennifer K. Starlin, Thrun Law Firm, P.C.

10:30 – 10:45 AM

Break

10:45 – 11:45 AM

130c — Grievance Management: Effective Strategies for Collective Bargaining Agreement Disputes
Developing an effective process for resolving grievances involves knowing when to take a stand and when to mutually resolve a grievance. Understand how the initial response must correctly identify the relevant legal issues. Learn the legal and practical considerations involved in addressing grievances, including an update of critical Michigan Employment Relations Commission (MERC) decisions.
Presenter(s): Robert H. Huber and Piotr M. Matusiak, Thrun Law Firm, P.C.

11:45 AM – 12:00 PM

Break/Passing Time

12:00 – 1:00 PM

130d — Legal Management of Personnel Files for Litigation in the Digital Age
Proper management of personnel files is crucial for defending against employment litigation related cases. Management of personnel files involves several legal considerations, including statutory requirements for maintaining personnel files, requirements for medical information, freedom of information requests, and secure preservation of personally identifying information. Management of personnel files is challenging in light of decentralized decision making that often results in some of the personnel files residing at the central office and part at a local school building. Management is also challenging when part of the file may exist in various digital data files.
Presenter(s): Marshall W. Grate, Clark Hill PLC

2:15 – 3:00 PM

130e — Legal Considerations in Hiring Contract Employees and Retirees
Districts are increasing their employment of outside contractors and retirees. Learn the steps to take to structure such relationships in a manner to avoid potential legal liability and Michigan Public School Employees’ Retirement System (MPERS) issues.
Presenter(s): Stephen R. Gee, Clark Hill PLC

3:00 – 3:15 PM

Break

3:15 – 4:00 PM

130f — Investigating Student and Workplace Sexual Harassment Claims
It is critical that schools take action to investigate and remediate all sexual harassment claims. Learn applicable state and federal statutes, important Michigan and federal court decisions, and appropriate policies and procedures for addressing these claims. Understand how to conduct internal investigations to reduce the risk of liability.
Presenter(s): Roy H. Henley and Jennifer K. Starlin, Thrun Law Firm, P.C.

4:00 – 4:30 PM

130g — MDE/MASA ESW Update
Learn the purpose and scope of the work of the MDE/MASA Educator Shortage Workgroup (ESW). Understand the proposed elements of this short-term toolkit and receive an overview of the Workgroup’s long-term strategic plan.
Presenter(s): Tina Kerr, MASA
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<thead>
<tr>
<th>Time</th>
<th>Session</th>
<th>Presenter(s)</th>
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<tbody>
<tr>
<td>8:30 – 8:45 AM</td>
<td>150a — Overview and Know Your Role</td>
<td>Bob Dwan, MSBO and Steven A. Lenar, Holly Area Schools</td>
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<tr>
<td>8:45 – 9:45 AM</td>
<td>150b — ORS for Beginners</td>
<td>Elizabeth Eastway, Wexford-Missaukee ISD; Bobby Hoppes and Josefina E. McCloud, Michigan Department of Technology, Management &amp; Budget (DTMB)</td>
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<tr>
<td>9:45 – 10:15 AM</td>
<td>150c — Pupil Accounting 101</td>
<td>Carrie Haubenstricker, Genesee ISD</td>
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<td>10:15 – 10:30 AM</td>
<td>Break</td>
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<tr>
<td>10:30 – 11:45 AM</td>
<td>150d — A Year in the Life of a Business Official: From Budget Hearings to Election Deadlines</td>
<td>Mathew F. Hiser and Kari K. Shay, Thrun Law Firm, P.C.; and Stacy L. Witt, South Lyon Community Schools</td>
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<td>11:45 AM – 12:00 PM</td>
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<td>12:00 – 1:00 PM</td>
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<tr>
<td>1:15 – 2:15 PM</td>
<td>150e — Grants Management 101</td>
<td>Alison Burns and Holly Stefanski, Plante Moran and Practitioner</td>
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<tr>
<td>2:15 – 2:45 PM</td>
<td>150f — Banking and Investing for the New Business Manager</td>
<td>Michael Barry, MILAF+/PFM Asset Management, LLC</td>
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<td>3:00 – 4:00 PM</td>
<td>150g — Benefit Basics for New Business Managers</td>
<td>Douglas L. Derks and Mike Hagerty, Gallagher</td>
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<tr>
<td>4:00 – 4:30 PM</td>
<td>150h — State Aid Status Report</td>
<td>Philip Boone and Christopher May, MDE</td>
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</table>
Bring up the issue of cybersecurity and even the most stalwart of techs may start to squirm. The issue can be overwhelming and figuring out where to begin is challenging. The Michigan Education Technology Leaders (METL), a workgroup of MAISA, stepped in to address this challenge by developing the Essential Cybersecurity Practices for K-12. Two thousand copies of this guidebook are being distributed to local district superintendents, business managers, and technology directors in Michigan.

Presenter(s): David Larson, Livingston ESA and Joel Phillips, Newaygo County RESA

The rapid change in technology has raised many questions for school district technology leaders such as the impacts of Family Educational Rights and Privacy Act (FERPA) in the cloud-computing age, the protection of intellectual property on the Internet, Acceptable Use Policies (AUP), data breaches, and Americans with Disabilities Act (ADA) webpage compliance. Learn what school districts should be doing to alleviate legal ramifications.

Presenter(s): Ryan J. Nicholson, Thrun Law Firm, P.C.

Most of us have experienced the torturous annual performance evaluation process. The time spent is often wasted on trying to remember what happened during the year and if any of it mattered. Too often this process is not helpful for anybody’s development or for making the school district better. Learn about an alternative approach that synchronizes employee growth and organizational improvement in a much more useful and productive process. This is a combined session with the facilities directors.

Presenter(s): Tom Platt, Decision Support Group

The lines between technology and facilities have blurred considerably as we recognize how more and more building systems, from climate control to access control, are all running over a network. Schools are not unique in this scenario. Hotels, for example, interact with multitudes of different customers every day, and much of that interaction is done digitally. They also have hundreds of spaces requiring climate control and security. How do they integrate their technology efforts with their facilities? Hear from the experts at the Amway Grand Plaza Hotel on how they approach these issues to ensure everything interfaces seamlessly. We’ll also take a tour and see where many of these operations take place.

This is a combined session with facilities directors.

Presenter(s): Russ Aubil and Michael Mosele, Amway Hotel Corporation
170 — Finance Pre-Conference • 8:30 am – 4:30 pm

8:30 – 8:35 AM
170a — Overview
Presenter(s): David Martell, MSBO

8:35 – 9:35 AM
170b — Federal Education Update
The newest education lobbyist from The School Superintendents Association (AASA), who also works as a federal legislative liaison with ASBO International, will discuss national education issues being considered by Congress and the administration. Learn what it could mean for schools. Topics addressed will include federal education funding, school nutrition, Medicaid and mental health in schools, E-Rate, and more.
Presenter(s): Chris Rogers, AASA, The School Superintendents Association

9:35 – 10:30 AM
170c — MDE Potpourri
MDE State Aid and School Finance representatives will provide information on the latest issues facing the school business official from the department’s perspective. Learn the new school level reporting, indirect cost changes, FID changes, and the latest on state aid.
Presenter(s): Representatives, MDE

10:30 – 10:45 AM
Break

10:45 – 11:45 AM
170d — Legal Update
Learn significant legal developments that impact school districts. Hear an overview of state and federal legislation, attorney general opinions, court decisions, as well as other legal requirements relevant to your district, including GASB impacts and more.
Presenter(s): Jennifer Chambers and Christopher Geck, Plante Moran

11:45 AM – 12:00 PM
Break/Passing Time

12:00 – 1:00 PM
Lunch

1:00 – 1:15 PM
Break/Passing Time

1:15 – 2:00 PM
170e — A Seat at the Table: Leveraging Your Expertise as a Business Official to Empower Change in Your School
There is much you can share with the educators that comprise your school’s leadership team beyond the management of resources and finances. Learn how to claim your seat at the decision-making table and impact long-term improvement. Explore the intersection of business management concepts and organizational change as they apply to school improvement.
Presenter(s): Charles Smargiassi, Wilkes University

2:00 – 2:50 PM
170f — Accounting and Auditing Update
Get an overview of the recent and upcoming changes in accounting standards and audit guidance will be provided covering a broad range of school law subjects — including finance, employment and labor law, student rights, Freedom of Information Act (FOIA), and Open Meetings Act (OMA).
Presenter(s): Ashley N. Higginson and Alan D. Szuma, Miller Canfield

2:50 – 3:05 PM
Break

3:05 – 3:50 PM
170g — Michigan Legislative Issues and a Look at Election Year Politics
What happens in Lansing affects your district. Hear from one of the top education lobbyists who works the legislative issues the education community may see during this election year.
Presenter(s): Peter Spadafore, MASA

3:50 – 4:20 PM
170h — School Aid Budget Status
Understand the details concerning the school aid fund and general fund budget priorities. Learn about the major differences between the Governor’s budget and those of the House and Senate. Get the information you need to prepare your district for the home stretch on budget preparation for 2020–21. (Certain presenters may not be available due to legislative commitments that may arise.)
Presenter(s): Beth Bullion, State Budget Office; Samuel Christensen, House Fiscal Agency; and Kathryn Summers, Senate Fiscal Agency

4:20 – 4:30 PM
170i — Wrap-Up and Review
Presenter(s): David Martell, MSBO
8:30 – 9:30 AM
180a — Making Performance Evaluations Meaningful
Most of us have experienced the torturous annual performance evaluation process. The time spent is often wasted on trying to remember what happened during the year and if any of it mattered. Too often this process is not helpful for anybody’s development or for making the school district better. Learn about an alternative approach that synchronizes employee growth and organizational improvement in a much more useful and productive process.
Presenter(s): Tom Platt, Decision Support Group

9:30 – 10:15 AM
180b — Supporting Specially Designed Transportation Plans
Hear from a transportation director and student services director on how they work together to design an effective plan for transporting special needs students. Learn about the key components of their communication strategies to ensure both departments understand the goal and the path to achieving that goal. Discover, as well, how each department benefits from the coordinated effort.
Presenter(s): Cynthia Valentine and Shailee Patel, Novi Community Schools

10:15 – 10:30 AM
Break

10:30 – 11:00 AM
180c — Camera Technology
Most districts are using cameras on their buses for interior behavior monitoring and exterior observation. Learn how this technology has evolved and what you can expect in the future from these tools.
Presenter(s): Mark A.R. Kimball, MOSS

11:00 – 11:45 AM
180d — Michigan Traffic Crash Facts
Hear the latest Michigan crash information and how to use it for improving your department’s safety record. You’ll discover an incredibly rich database with crash information from everywhere in Michigan. Discover data from as far back as 1992 and learn to make your own queries customized for your needs. Examine the results in many forms: maps, tables, lists, pie/bar charts, on a timeline, or by downloading the actual police reports.
Presenter(s): Nichole Ritchie Orton, University of Michigan Transportation Research Institute (UMTRI)

11:45 AM – 12:00 PM
Break/Passing Time

12:00 – 1:00 PM
Lunch

1:00 – 1:15 PM
Break/Passing Time

1:15 – 2:15 PM
180e — Successful Drug Testing Programs and Compliance with The Drug & Alcohol Clearinghouse
Learn how to ensure you are following proper protocols when testing drivers for drug and/or alcohol abuse. Learn about the recent implementation of the Federal Motor Carrier Safety Administration (FMCSA) Drug & Alcohol Clearinghouse that took effect this year. It’s important that you and your drivers understand the importance of complying with this new program and how it functions, and when queries and reporting violations are required. This knowledge will help you ensure that your testing provider is reporting specific violations on your behalf and operating within the Clearinghouse parameters.
Presenter(s): Lorri Smith, Integrity Testing & Safety Administrators, Inc.

2:15 – 2:30 PM
Break

2:30 – 3:15 PM
180f — MIOSHA
Learn about common violations and guidance for complying with the Michigan Occupational Safety & Health Administration (MIOSHA) regulations, specifically related to garage operations. Learn what to expect should your district be inspected.
Presenter(s): Robert Atkins, MIOSHA

3:15 – 4:30 PM
180g — Transportation Legal Update
Pupil transportation addresses a variety of issues when it comes to transporting children. From delivering students to different houses based on which parent is caring for the child that day — to homeless student obligations, and Schools of Choice. There are also privacy issues to consider with cameras installed on buses. Learn what the laws really require.
Presenter(s): Stephen R. Gee, Clark Hill PLC
8:30 – 11:45 AM
Certification Classes

190 — Cash Management
Learn how to develop specifications for the selection of banking and other financial services. Learn how to apply the concept of compensating balances and understand procedures and legal constraints for cash collection and disbursement. Understand how to analyze monthly internal transfers and loans; prepare a cash flow analysis, including a fund balance report for the board of education; and identify and deal with fraud and abuse. Required: Business Office Manager, Business Office Specialist, Chief Financial Officer — Elective: all other tracks.
Presenter(s): Michael Barry, PFM Asset Management, LLC; Amanda Fletcher, Plante Moran; and Mary Beth Rogers, Clarkston Community Schools

191 — Accounting Manual and Chart of Accounts
What every school payroll/personnel specialist should know about the Michigan Public School Accounting Manual (Bulletin 1022). Learn how the manual serves as a mandatory guide to the uniform classifications and recording of accounting transactions for Michigan public school districts. Learn how to monitor your district’s budget and account for payroll division of state and federal programs and compensated absences and averages. Required: School Payroll Specialist — Elective: all other tracks.
Presenter(s): Christopher May, MDE and Sharon Raschke, Dexter Community Schools

192 — Effective Communications
Learn techniques and strategies to send clear messages, create credibility, and develop strategic communication programs that are effective for your school district. Required: all tracks except — Elective: Business Office Specialist and School Payroll Specialist.
Presenter(s): Anita Banach, Anchor Bay School District and John Helmholdt, Grand Rapids Public Schools

193 — Benefits/Retirement
Learn how to explain employee, social security, and retirement benefits to school district employees. Develop an understanding of health care costs, as well as the intricacies of the Consolidated Omnibus Budget Reconciliation Act (COBRA). Learn how to work with your school district’s bargaining teams on defining the total cost of compensation. Required: Human Resource Specialist — Elective: all other tracks.
Presenter(s): Kathleen Hamilton, St. Joseph Public Schools, Michael P. McEvilly, GLP & Associates, Inc. and Representative, SET SEG

11:45 AM – 12:00 PM
Break/Passing Time

12:00 – 1:00 PM
Lunch

1:00 – 1:15 PM
Break/Passing Time

1:15 – 4:30 PM
Certification Classes

194 — Human Resources for the Business Manager
Understand the basic concepts of hiring, recruiting and interviewing. Learn techniques and best practices that you can apply to employee orientations. Learn about the importance of maintaining personnel records to protect both the employee and employer in the event of personnel file information requests. Employee handbooks and acceptable use policies will be covered, as well as details on the Freedom of Information Act (FOIA), Family Medical Leave Act (FMLA), and Fair Labor Standards Act (FLSA). Required: Chief Financial Officer — Elective: all other tracks.
Presenter(s): Mark Dobias and Todd Surline, Hiring Solutions LLC

195 — Systems: HVAC, Electrical, and Technology
Understand different facilities HVAC systems and their components. Analyze the working relationship between HVAC, electronic systems, and technology in your school district. Required: Facilities Director — Elective: all other tracks.
Presenter(s): Ronald A. Boezwinkle, James Harrison, and Paul Hector, GMB Architecture + Engineering and Susan Case, Forest Hills Public Schools
1:15 – 4:30 PM
Certification Classes

196 — Principles of Education
Understand the educational process and the culture of schools. Learn about major learning theories; teaching methodologies; school improvement; design of in-service programs; and the structure and function of the principalship. Required: all tracks except Child Nutrition Director.
Presenter(s): Chris Wigent, MASA and Wendy Zdeb, MASSP

197 — Technology for the Business Manager
Learn how to develop long-range technology planning, while assigning appropriate specifications for technology purchases. Understand technology infrastructure for the school district; evaluate the cost/benefit of producing information in relation to organizational value; and how to ensure that appropriate security is maintained. Required: Business Office Manager, Chief Financial Officer — Elective: all other tracks.
Presenter(s): Christopher D. Lamer, Michael Rohwer, and Rex Thelen, Ottawa Area ISD

1:15 – 4:30 PM
Half-Day Workshops

198 — Michigan Office of Retirement Services (ORS) Processor Workshop
Payroll processing has become more than just entering time sheets! Processing of retirement related benefits has become more complex with recent regulatory changes. Get reporting tips and hiring procedures. Learn about reportable and non-reportable compensation issues, staff training and communication, and rules for returning to work.
Presenter(s): Bobby Hoppes and Josefina E. McCloud, Michigan Department of Technology, Management & Budget (DTMB)

199 — Interpreting Communication Styles
In today’s organizations, we are emailing, texting, Tweeting, and Instagramming everything. When you receive an email, do you know the "communication style" someone is using to convey their thoughts? Have you ever wondered why someone sending an email or text uses the adverbs, adjectives, and/or prepositions they do? Why do some people write sentences that end in periods but read like explanation points? Explore 12 archetypal imprints that dictate and are the impetus for the words our co-workers, students, and parents use in their verbal and written communication. Knowing how to interpret their language allows us to communicate more effectively. Powerful communication changes minds!! (So, why did I use these word choices to write this description? What do you know about the speaker for this session from the word choices used to convey purpose of this session?)
Presenter(s): David J. Hulings, Hulings and Associates, L.L.C.

Tuesday Evening

5:00 – 6:00 PM
Michigan Schools Energy Cooperative (MISEC) Annual Meeting
Upper Peninsula SBO Meeting

5:00 – 8:00 PM
Past Presidents Reception and Dinner (Invitation Only)
6:00 – 7:00 AM

201 – Yoga with Amanda
Jump start Wednesday with energizing yoga.
Presenter(s): Amanda Tollstam, Inner Peace Therapy

7:00 AM

Registration and Breakfast

8:00 – 9:00 AM

Opening General Session and Welcome — President Thomas L. Armstrong
President Thomas L. Armstrong will open the 2020 Annual Conference and Exhibit Show and welcome participants and set the stage for our time together.

Super Session: Dr. Michael F. Rice, State Superintendent
State Superintendent Dr. Michael Rice will provide an update on Michigan’s Top 10 in 10 strategic goals designed to make Michigan a premier education state. Dr. Rice brings a strong leadership foundation and an extensive background in public education to his leadership role at the Michigan Department of Education.

9:00 – 9:20 AM

Break/Passing Time

9:20 AM – 12:20 PM

Session A

A01 — Time Management
Time management is the analysis of how working hours are spent and the prioritization of tasks in order to maximize personal efficiency in the workplace. Learn how to become a more effective manager by budgeting your time, eliminating distractions, identifying and assigning priorities, and establishing and achieving daily goals.
Required: Chief Technology Officer and Operations Director — Elective: all other tracks.
Presenter(s): Todd Bell, Kentwood Public Schools

A02 — Introduction to Facilities Management
Understand educational facilities operations with a focus on several key areas. Learn the role of the facilities manager in the educational community and the impact of facilities in general on the learning and work environment. An outline of the legal and regulatory responsibilities will also be discussed.
Required: Facilities Director — Elective: all other tracks.
Presenter(s): Tim Peraino, Kent ISD

A03 — Collective Bargaining Basics
Understand the basic steps and practical tips related to navigating through the collective bargaining process. Learn the process of effective collective bargaining starting with an overview of the process, laws impacting collective bargaining, and practical tips for navigating the process. Examine the cost analysis of collective bargaining and how to access state aid information. Learn the impact of step increases and other wages and benefits on the school district’s budget.
Presenter(s): Katherine Wolf Broaddus and Katerina M. Vujea, Thrun Law Firm, P.C.

A04 — Payroll Processing and Legal Compliance
Gain insight on how your procedures for payroll processing intersect with legal compliance. Understand reporting, recordkeeping, tracking, timing, leave, and overtime rules and determination of employee vs. independent contractor.
Presenter(s): Michele Buckley, Kalamazoo RESA and Ryan J. Nicholson, Thrun Law Firm, P.C.

9:20 – 10:20 AM

Session B

B05 — Environmental Compliance is Critical
Testing for lead and copper in water systems, monitoring underground storage tanks, and managing asbestos plans are just some of the areas where schools need to pay attention to avoid risk. Discover the latest updates on these and other compliance issues and learn strategies to effectively handle them.
Presenter(s): Scott P. Staber, Arch Environmental Group, Inc.

B06 — Shining the Light on Solar Projects
Solar energy can be an attractive source of renewable energy for schools and can produce significant utility cost savings. However, it’s important to understand the relationship between a building’s electric demands and the proposed system production and to understand the basic legal and financial structures, contract documents, and federal tax credits that enable third-party solar financing for school districts. Discover the process of implementing a solar/renewable energy project from procurement through installation and operation. Learn to identify the key elements of third-party agreements for the purchase of energy. Learn the right questions to ask and how to analyze the answers, which will increase the chances of making the best decision when it comes to implementing solar energy in your district.
Presenter(s): Kurt W. Carter, Performance Contracting Owner’s Representatives LLC and Fredric G. Heidemann and Ian F. Koffler, Thrun Law Firm, P.C.
9:20 – 10:20 AM
SESSION B

B07 — Basic Treasury Filing Requirements
Understand how to obtain State of Michigan treasury approval to borrow under the Revised Municipal Finance Act. Recognize the common pitfalls of borrowing. Learn about qualifying statements, prior approval, waivers, and post-issuance reporting requirements.
Presenter(s): Ronald C. Liscombe, Miller Canfield and Representative, Michigan Department of Treasury

B08 — Implementing and Growing a Purchasing Card Program
Learn how your district will benefit from the MSBO-endorsed purchasing card program. Effective implementation and use can save your district resources in staff time and cash flow.
Presenter(s): Beth Smith, PFM Financial Services, LLC

B09 — The Bond Passed: Now What?
Many school districts are embarking on building improvement projects costing millions of dollars. While you're paying a great deal of attention to building design and site planning, don't forget the negotiation of construction contracts. Learn how to take every measure necessary to protect your district's financial interest in the building project before the first board is cut!
Presenter(s): Kari K. Shay and Jeffrey J. Soles, Thrun Law Firm, P.C. and Michael Steinbrook, PFM Asset Management LLC

B10 — Enhancing the Effectiveness of Your Districts' MD&A
Explore the required elements of Management Discussion and Analysis (MD&A). Learn the problems to avoid and best practices for effective communication of your school district's story.
Presenter(s): Stephen W. Blann, Rehmann

B11 — Analyzing Debt Refinancing Opportunities in Today's Market
Federal tax reform has limited school districts’ ability to refinance debt. However, current market rates may provide alternative refunding opportunities for your district. Learn options available to restructure or reduce interest cost on your existing debt, as well as how to analyze the various options.
Presenter(s): Steven A. Lenar, Holly Area Schools and Nathaniel Watson, PFM Financial Advisors, LLC

B12 — Learning How to Prevent Fraud: Districts Who Learned the Lessons the Hard Way
Using various district examples from across the country, learn how fraud was committed, how it was discovered, and how it can be prevented/mitigated so that your district does not become headline news.
Presenter(s): Amanda Fletcher, Plante Moran

B13 — Bonds vs. Sinking Funds: Which Best Fits Your District?
Learn the best practices for determining if sinking funds or bonds are right for your district and how to engage the proper district personnel in the decision-making process.
Presenter(s): Christopher J. Iamarino, Thrun Law Firm, P.C.; R.J. Naughton, PFM Financial Advisors, LLC; and Construction Manager

B14 — Behavioral Ethics: Impact on Internal Controls
Learn about ethical dilemma situations you may face in a professional environment and understand the impact that a poor decision can make on internal controls.
Presenter(s): Eric V. Formberg, Plante Moran

B15 — Benefits Administration 101
Learn the “need to know” items related to establishing and managing an efficient benefit program. Understand how to identify common causes of cost inefficiencies.
Presenter(s): Douglas L. Derks and Mike Hagerty, Gallagher

B16 — Banking and Investing
Learn about the current school code regulating investments. Understand the importance of developing a district investment policy. Learn about cash flow analysis and district borrowing options.
Presenter(s): Kari Blanchett, PFM Asset Management, LLC

B17 — Managing Your Food Service Management Partnership
Contracted food service management is a reality in Michigan. School districts and food service management companies are responsible for maintaining a successful partnership. Both sides need to understand program structures, costs and benefits, and how they are calculated in a contracted scenario. Learn how to ensure your district is receiving the most effective service from a contractor. Contracted or not, learn best practices that apply in both situations.
Presenter(s): Mary Darnton, Hudsonville Public Schools/Jenison Public Schools

B18 — Ain’t Nobody Got Time for That!
You can do anything but you can’t do everything! As driven professionals striving for improvement, how can we not neglect other things like health, family, and our own well-being? Don’t waste your time on email perfectionism, people pleasing, mom/dad guilt, and more! There are no easy answers, but intentionality is essential for a fulfilling life at career and home.
Presenter(s): Lisa Stevens, American Fidelity
9:20 – 10:20 AM
SESSION B

B19 — Document Retention in the Electronic Age
School districts are subject to a series of laws and rules which mandate how school district records must be maintained. Learn the ins and outs of the various laws, the fiscal responsibilities for school districts, and strategies to comply. Learn the common mistakes made by school districts and persistent misconceptions about the Open Meetings Act (OMA) and Freedom of Information Act (FOIA).
Presenter(s): Marshall W. Grate, Clark Hill PLC

B20 — The Opioid Epidemic: What Michigan Public Schools Should Know
Get a general understanding of the opioid epidemic and learn how to assess and address the issue to reduce risk and cost. Learn strategies for destigmatizing the issues and getting help to those who need it.
Presenter(s): Representative, Gallagher

B21 — Pupil Accounting Fundamentals
Pupil accounting rules and regulations can be a complex maze for both new and seasoned business officials. Understand the basic rules and regulations concerning pupil accounting as school budgets rely on the revenue generated by pupil membership. Understand the issues concerning pupil accounting, full-time equivalent (FTE) deductions, and membership counts.
Presenter(s): Robert A. Dietzel and Piotr M. Matusiak, Thrun Law Firm, P.C.

B22 — Writing a Proper RFP and the Rules to Follow
Understand the Request for Proposal (RFP) process from start to finish. Learn how to solicit bids from small to large projects and services, where to find examples, and how to evaluate proposals post bid.
Presenter(s): Dana L. Abrahams and Jeremy S. Motz, Clark Hill PLC

B23 — Ransomware: The Threat is Real and It Happened to Us!
Security protocols have to be in place to protect school districts from ransomware attacks. The threat is real and several districts in Michigan have been struck in the last year. What happens if you are attacked and your data is compromised? Learn best practices in security data and how the risk to school districts can be minimized.
Presenter(s): John Gilchrist, Kenowa Hills Public Schools

B24 — Budgets for IT
Learn the challenges and opportunities of developing a technology budget. Understand ways to be proactive in collaborating with your business manager in prioritizing your technology expenditures.
Presenter(s): Neil R. Cassabon and Kevin M. Hustek, Warren Woods Public Schools

B25 — Managing Transportation Risks
Risk in transportation should be about a lot more than accidents and insurance. Learn to identify the operational risks that exist in a transportation department, establishing a mechanism to evaluate the severity of the risk, and developing mitigation strategies. Key areas of concern include drivers, policies and procedures, technology, contracts, and assets.
Presenter(s): Tom Platt, Decision Support Group

10:20 – 10:40 AM
Break/Passing Time

10:40 – 11:40 AM
SESSION C

C05 — Effective Facility Use Protocols
Whether you’re hosting summer camps or after-school programs at your district, it’s essential to have facility use agreements in place to protect your buildings and facilities. Learn what guidelines are recommended for districts to put in place when the public is allowed access to district facilities.
Presenter(s): Michael Grosso, SET SEG

C06 — Security as a System
Too often schools approach security issues and upgrades in a piecemeal fashion versus an integrated system throughout the district. Just as we standardize many of our systems, such as HVAC or interior paint, etc., shouldn’t we also standardize our security components? Examine your security goals and assimilate them into a broader system for the entire district.
Presenter(s): Geno Montayne and Tony Spisak, Wayne-Westland Community Schools and Carl VanderZee, Communications by Design

C07 — Budget Timelines for ISD’s
Did you know that budgeting for ISD’s is different than at a local district? Timelines, communication, and complying with Michigan laws come in to play. Learn best practices.
Presenter(s): Brian Marcel, Washtenaw ISD

C08 — Purchasing in an Online Marketplace
Learn how the largest and most trusted cooperative purchasing organization for public sector procurement can save your district time and money.
Presenter(s): Tom Ford, OMNIA Partners
**Wednesday • April 22, 2020**

10:40 – 11:40 AM

**SESSION C**

C09 — Cash Flow and Short-Term Borrowing Options

Gain a better understanding of school districts’ options for borrowing for cash flow and other short-term borrowing. Learn the process and timelines involved with each as well as tips on how to structure each type of note to best fit your school district.

Presenter(s): Jeffrey J. Soles, Thrun Law Firm, P.C.

C13 — Special Education Finance for the Business Manager

Learn about special education funding and reporting from a business office perspective. Understand how special education funding works, including local, state, and federal funding. Learn strategies to organize the financial elements of special education in your district.

Presenter(s): John G. Cloft, WAYNE RESA

C10 — CHAMPS Facility Settlement Subsystem Update

Understand the Community Health Automated Medicaid Processing System (CHAMPS) Facility Settlement Subsystem. Learn about data input and completion, how to avoid mistakes, accessing initial and final settlements, and interpreting reports.

Presenter(s): Dana Billings, Steve Ireland, and Amy Kanter, Michigan Department of Health & Human Services (DHHS)

C11 — Balanced Calendar (Year-Round School) and the Effect on the Business Office

Learn how to account for an academic calendar that crosses two fiscal years and two separate years of a labor agreement. Obtain strategies to prepare contracts, agreements, and business operations to coincide with the new school calendar.

Presenter(s): Kim H. Lindsay, Rehmann and Leslie L. Young, Davison Community Schools

C12 — GASB 84 and Strategies to Comply

The new accounting guidance under GASB 84 has resulted in a renewed focus on a school district’s allowable expenditures. Learn the legal restrictions on expenditures from a school district’s general fund, governmental funds, and fiduciary funds under GASB 84.

Presenter(s): James M. Crowley, Miller Canfield and Matthew Kelly, Plante Moran

C14 — Legislative Update

What’s happening in Lansing affects your district. Learn how the current legislative session is going in Lansing and what legislation could impact your district.

Presenter(s): Christopher Glass, West Michigan Talent Triangle

C15 — Consolidated Application Grants and the Business Manager

Learn the links between student performance data, school improvement plans, district grants, and accounting records. Understand the consolidated application process and the business manager’s role in that process.

Presenter(s): Tricia R. Lowery, Buchanan Community Schools

C16 — Bond Issuance 101

How do you sell bonds? Why? Who needs to be involved and how long does the process take? Learn the basics of the bond issuance process, including participants, ratings, and markets.

Presenter(s): Kari Blanchett, PFM Financial Advisors, LLC

C17 — Critical Food Service Budget Metrics

Running a successful school food service operation is very much like running a successful business. There are many metrics to guide you in order to keep a program self-supporting. How should labor costs compare to food costs? How many meals per labor hour should be expected? Whether you are a food service director or a business manager with oversight responsibilities, it’s important for you to understand these data points, along with how to influence them positively for a financially successful program.

Presenter(s): Lori Adkins, Oakland Schools and Carolyn Thomas, Macomb ISD

C18 — A Seat at the Table: Leveraging Your Expertise as a Business Official to Empower Change in Your School

There is much you can share with the educators that comprise your school’s leadership team beyond the management of resources and finances. Learn how to claim your seat at the decision-making table and impact long-term improvement. Explore the intersection of business management concepts and organizational change as they apply to school improvement.

Presenter(s): Charles Smargiassi, Wilkes University

C19 — Legal Update

Learn significant legal developments that impact school districts. Hear an overview of state and federal legislation, attorney general opinions, court decisions, as well as other guidance will be provided covering a broad range of school law subjects — including finance, employment and labor law, student rights, Freedom of Information Act (FOIA), and Open Meetings Act (OMA).

Presenter(s): Robert A. Dietzel and Timothy T. Gardner, Thrun Law Firm, P.C.

C20 — Contractual Relationships with Retirees and Contractors

As districts struggle to fill vacancies, the tendency to contract with retirees and outside consultants can be advantageous. Understand the language to include, and avoid, when
10:40 – 11:40 AM
SESSION C
entering these types of contract agreements.  
Presenter(s): Margaret M. Hackett, Thrun Law Firm, P.C.

C21 — Enrollment Projections Done Right!
Understand the process and analysis behind enrollment projections. Learn how to calculate the projection and explain the impact of the data to stakeholders. 
Presenter(s): Paul Wills, Plante Moran CRESA

C22 — Negotiating Contracts for Goods and Services
Whether you are a buyer or a seller, understanding the legal obligations, the drivers behind the deal, and the basic elements for contract formation can greatly enhance your leverage and bargaining position. Learning the effect various terms have on the overall deal will enable you to recognize problematic areas, negotiate changes when appropriate, and negotiate your position to reach terms you are able to live with.  
Presenter(s): Dana L. Abrahams and Jeremy S. Motz, Clark Hill PLC

C23 — Essential Cybersecurity Practices for K-12
Learn Cybersecurity best practices for Michigan schools. Understand the top 20 security controls and how they affect daily operations. 
Presenter(s): Matthew McMahon, Gratiot-Isabella RESD

C24 — Have You Been Asked About Data? Connect with the Michigan Data Hub
Learn how your district can seamlessly integrate third-party applications using the MiDataHub. MiDataHub provides integration support that includes the exchange of data between Student Information Systems (SIS), assessment, food management, behavior, data warehouses, and dashboard systems. 
Presenter(s): David Cairy, MAISA and Don Dailey and Tom Johnson, Michigan Data Hub

C25 — Do You Know Who’s Driving Your Buses?
Whether you directly employ your school bus drivers or contract with a third-party vendor, school districts have the ultimate responsibility to ensure that all drivers are in compliance with all applicable rules and regulations. Learn what needs to be done, how it should be documented, and how to correct deficiencies, if identified. Whether you’re an inhouse operation or a contracted one — this is applicable information to minimize consequences should there be a driver related incident. 
Presenter(s): Lori Richardson, Oakland Schools

11:40 AM – 12:00 PM
Break/Passing Time

12:00 – 1:30 PM
Lunch, Awards, and Business Meeting
MSBO President Thomas L. Armstrong will lead us through the business meeting, present awards to MSBO members and educational leaders, and thank our sponsors and associate members.

1:30 – 2:30 PM
Keynote Presentation:
Colonel Arthur J. Athens, USMC (Ret.)
“The Fulcrum of Leadership”

A common example of a fulcrum is the center support of a seesaw found on a playground. A leader’s attitude and actions determine which direction their “team’s lever” will tip. In one direction, teams become dysfunctional and discouraged. In the other direction, teams flourish and achieve extraordinary results. Learn how school business leaders can become more effective at the fulcrum point and lead their districts to higher levels of motivation, achievement, and fulfillment.

2:30 – 5:00 PM
Exhibit Show

4:30 – 5:00 PM
2020-21 Committee Chair and Regional President Orientation (Invitation Only)

5:00 – 6:00 PM
Wayne County SBO Meeting

5:15 – 6:00 PM
Northern Michigan SBO Meeting

5:30 – 7:00 PM
MSBO Welcome Reception
All attendees welcome.
7:00 AM

29th Annual SET SEG Fun Run/Walk
Meet in the Pantlind Lobby, in front of Ruth's Chris Steak House.
Join SET SEG for their 29th annual Fun Run/Walk which consists of a 5k run or one mile walk around downtown Grand Rapids. Prizes for registered conference attendees will be awarded at the Thursday Closing General Session. A complimentary commemorative SET SEG Fun Run/Walk t-shirt is provided to preregistered participants only.

7:00 AM

Registration and Breakfast

8:20 – 11:20 AM

SESSION D

D01 — Food Service Program Accountability
Learn how to develop a comprehensive internal audit/evaluation system for reviewing all aspects of your food service program. Learn how to perform audits in all areas to ensure compliance of local, state, and federal regulations and guidelines. Understand policies and agreements that govern food service operations. Required: Child Nutrition Director — Elective: all other tracks.
Presenter(s): Melanie Brummeler and Aimee Haapala, MDE

D02 — Introduction to Pupil Accounting I
Understand Michigan’s Pupil Accounting Manual (PAM) and requirements related to count days. Learn about the importance of timelines and enrollment requirements. Understand the three student populations as defined by the PAM. Required: Pupil Accounting Auditor, Pupil Accounting Specialist and Specialist in Educational Data — Elective: all other tracks.
Presenter(s): Barbette Lane, Wexford-Missaukee ISD and Holly J. Scott, Holt Public Schools

8:20 – 9:20 AM

SESSION E

E03 — Construction Projects: Clarifying Widespread Misunderstandings about Laws and Procedures
School districts continually face varying levels of construction, renovation, and remodeling projects. When certain rules and regulations apply can be confusing. When do you need to use a licensed architect or have plan approval through the State Bureau of Construction Codes? Understand common misconceptions about laws applicable to school construction.
Presenter(s): Philip G. Clark and Kirk C. Herald, Thrun Law Firm, P.C.

E04 — School Security and Access Control Considerations
Districts strive to ensure that students and staff are safe in their school buildings and often look at some sort of building access control. There is a wide range of solutions available. Learn what to consider when investigating the various options. Hear benefits and challenges when it comes to electronic door access, key control, and video surveillance.
Presenter(s): Jeff Blackford, The Eisen Group

E05 — Dissecting Your Bank Analysis Statement
Whether you know it or not, your bank is tracking every activity you make. Get a sample analysis statement to identify ways to reduce risk, cut costs, and improve earnings. Learn banking options available for Michigan school districts.
Presenter(s): Brian K. Quinn, MILAF+/PFM Asset Management, LLC

E06 — Capital Project Funding Options: Avenues for Operational Cost Savings
Michigan school district infrastructure and capital improvement funding includes both voted and non-voted authority options. Learn descriptions, uses, and limitations of many funding sources including qualified and non-qualified bonds, sinking funds, recreation authority, resolution bonds, qualified zone academy bonds, energy conservation, public education facilities bonds, power purchase agreements, sale of property, and other financings.
Presenter(s): Joseph B. Urban, Clark Hill PLC

E07 — MDE Potpourri
MDE State Aid and School Finance representatives will provide information on the latest issues facing the school business official from the department's perspective. Learn the new school level reporting, indirect cost changes, FID changes, and the latest on state aid.
Presenter(s): Representatives, MDE

E08 — Online Payment Solutions
Cash handling and collection is one of the biggest risk areas in your district. Learn how to virtually eliminate the cash collections through the use of a simple online system that you control. 24/7 payments will give your community access to transact on their schedule.
Presenter(s): Gino Caponi, PaySchools

E09 — Establishing a School Foundation Under IRC 501(c)(3)
With the implementation of GASB 84, many schools are looking at moving certain activities to entities outside of the school district. Learn the steps required to establish and maintain a tax-exempt school foundation for education and other school activities. Understand
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SESSION E

scholarship and endowment funds maintained within a foundation.  
Presenter(s): James M. Crowley, Miller Canfield and Practitioner

E10 — Understanding and Preparing for Your Annual Audit  
Understand how to effectively prepare for a successful fiscal audit, including strategies to communicate the final results to your stakeholders. Learn your role as a new business manager.  
Presenter(s): Jason R. Helsen, Muskegon Area ISD and Marc R. Sawyers and Carol Schachermeyer, Hungerford Nichols CPAs + Advisors

E11 — The Profit and Pitfalls of Shared Time Arrangements with Nonpublic Schools  
Learn the constitutional requirements of the state and federal establishment clauses relating to allowing public school teachers to teach in nonpublic schools. Understand the statutory requirements under the State School Aid Act for the public school to receive state school aid for teaching non-core curriculum.  
Presenter(s): Marshall W. Grate, Clark Hill, PLC

E12 — Accounting and Auditing Update  
Get an overview of the recent and upcoming changes in accounting standards and audit requirements relevant to your district, including GASB impacts and more.  
Presenter(s): Jamie Essenmacher, Plante Moran

E13 — Grants Management 101  
New to grants? Learn the basics of grants management and key management procedures. Understand the role of the finance office. Illustrate the importance of indirect costs and the impact on a district’s budget.  
Presenter(s): Alison Burns, Plante Moran and Practitioner

E14 — Board and Superintendent Communication  
What do board members really want? Learn tips on how to communicate with your superintendent and board of education. Demonstrate leadership within your district by understanding communication styles better.  
Presenter(s): Timothy A. Raymer

E15 — Adverse Childhood Experiences and the Whole Child Health and Well-Being  
Adverse Childhood Experiences (ACEs) have long-term health and learning impacts. Understand the components of the Whole School, Whole Community, Whole Child (WSCC) model and the impact of ACEs on student education outcomes. Learn the ACEs and WSCC components and how to work through strategy planning to apply these in your own district.  
Presenter(s): Phil Chase, MDE and Carolyn Thomas, Macomb ISD

E16 — Excel for Smarty’s: Intermediate  
You know how to use Excel, but do you know how to build advanced formulas into your common spreadsheets? Learn how to enhance your Excel spreadsheets you use for budgeting, keeping track of payroll, or for other district accounting purposes. A “hot list” of formula’s will be provided!  
Presenter(s): Christopher J. Frank, Bay-Arenac ISD

E17 — CBD, Medical Cannabis, and Vaping: What School Officials Need to Know!  
Gain a general understanding of the law, considering the differences in state and federal laws prompting litigation across the country. Learn emerging case law; obligations, rights, and risks for students using cannabis and vaping; the implications for staff; recommended policy changes; and the importance of developing appropriate board policies.  
Presenter(s): Ashley N. Higginson, Miller Canfield

E18 — Collective Bargaining: Innovations and Advanced Strategies  
Learn advanced negotiation collective bargaining strategies. Bargaining delays, tensions, public pressure, and other “roadblocks” are common in the collective bargaining process. Hear proven strategies for reaching a resolution when negotiations become difficult.  
Presenter(s): Raymond M. Davis, Thrun Law Firm, PC. and Michelle Sine, Charlotte Public Schools

E19 — Employee Leave and Compensation: Get It Right or Pay the Price  
Making a mistake, even an unintentional or seemingly harmless one, relative to administering Family Medical Leave Act (FMLA) or failing to appropriately record hours and compensate employees under the Fair Labor Standards Act (FLSA) can be very costly in terms of both money and lost productivity. Understand how to implement proactive steps, including the review of board policies, collective bargaining agreements, and individual contracts to ensure that these issues are handled correctly from the start.  
Presenter(s): Timothy T. Gardner and Katerina M. Vujea, Thrun Law Firm, PC.

E20 — Where Do We Go From Here? Evaluating Health Insurance Solutions  
Learn about recent developments in the healthcare marketplace, including hospital pricing transparency, drug rebates, gene therapy, and pooling and how they are likely to impact school district health plans. Hear creative ways to control healthcare costs and explore best practices for effectively evaluating...
potential changes to a district’s health insurance program.
Presenter(s): Chadd Hodkinson, Gallagher

E21 — Pupil Accounting for the Nontraditional Learning Environment
Alternative learning environments are becoming more prevalent in pupil accounting. The state is encouraging these alternative learning environments such as shared time, virtual learning, and homeschool students. Learn strategies to properly account for the students in these programs and avoid common mistakes. Learn how to structure your programs so you can capture all of the full-time equivalent (FTE) and hear case studies.
Presenter(s): Jessica Beagle and Brian Ciloski, MDE

E22 — Fundamentals of Purchasing Policies and Procedures
Understand various purchasing laws and regulations, as well as good policies and procedures, and some that “need improvement.” Bring your own district policies and procedures to reference and seek input. Get the nitty-gritty information you need to make sure your district is protected and operating according to best practices. Having the proper framework for purchasing can save your district money and save embarrassment if there is a problem.
Presenter(s): Dana L. Abrahams and Jeremy S. Motz, Clark Hill PLC

E23 — The Law and Technology for School Officials
Understand laws surrounding technology, including Bring Your Own Device (BYOD) policies, student/employee use of technology, and other district policies and procedures. School districts often utilize third-party vendors for the storage of student records.
Privacy laws, including provisions of Family Educational Rights and Privacy Act (FERPA) and the Revised School Code impact the transfer of student records. Learn how privacy laws help ensure compliance when contracting with vendors or developing policies and procedures.
Presenter(s): Daniel R. Martin, Thrun Law Firm, PC.

E24 — The Basics of Implementing One-To-One Devices in Your District
Thinking about one-to-one device implementation? It is not as easy as just buying the devices. Explore funding and understand how one-to-one devices work with curriculum.
Presenter(s): Drew Bordner and Mike Stephayn, Gull Lake Community Schools

E25 — School Bus Construction
School buses are the safest mode of travel for students going to and from school. Understanding what goes into the construction of a bus can help you explain to others why the buses are so safe and what influences the cost of a bus. Learn how school bus design has evolved over the years and what may be changing in the near future.
Presenter(s): Kelly Spires, Blue Bird Corporation

F04 — Leverage Your Work Order System
Many districts have employed some sort of work order system over the past decade. But are they capturing essential data that can really help assess the operation? Discover ideas on how to manage your work order system more completely and what that information can do for you.
Presenter(s): Nick Budde and Simone Naz, Dude Solutions

F05 — PTO and Booster Groups: On or Off the District’s Books?
Get answers to common questions about booster and Parent Teacher Organizations (PTO) groups financial reporting and how your district’s involvement impacts your GASB 84 reporting requirements.
Presenter(s): Jennifer Watkins, Yeo & Yeo CPAs & Business Consultants

F06 — Building Community Through Bond Projects: An Overview of the Process and Roles
Learn the role of the architecture and engineering firm, construction manager, and owner’s representative in developing bond projects. Learn the process of a bond project and how to make successful selections to help your district build and strengthen its community.
Presenter(s): John Davids and Brendon Pollard, Kingscott Associates, Inc.; Gary Steller, Clark Construction Company; and Paul Wills, Plante Moran CRESA

F07 — CTE Reporting and Spending
Learn how to budget for Career and Technical Education (CTE) in relationship to the Section 61a.1 vocational education funding. Learn what are the allowable expenses and how to reconcile those expenses.
Presenter(s): Jill Kroll, MDE; Deb Miller, Kalamazoo RESA; and Pat Yanik, St. Clair County RESA
F08 — Subrecipient Monitoring & Collaboration Under Uniform Grant Guidance
Learn how single audit stakeholders can collaborate with one another throughout the grants management process to improve outcomes and reduce risk of noncompliance. Understand risk assessment, monitoring processes, corrective action, and audit follow-up.
Presenter(s): John Andrejack, MDE and Holly Stefanski, Plante Moran

F09 — The ABC’s of Federal Program Compliance and Accounting Along with Preparing for Your Audit
Learn everything you need to have in place for a successful federal program audit, which includes examples of policies and procedures to meet the federal requirements. Understand how to prepare your Schedule of Expenditures of Federal Awards (SEFA) and prepare for your audit (including single audit). Get examples of necessary documents and common findings.
Presenter(s): Kristi Krafft-Bellsky, Yeo & Yeo CPAs & Business Consultants

F10 — Understanding the Headlee Rollback and Effective Millage Proposal Strategies
Navigating the tax levy and collection process can be overwhelming and inadvertent mistakes may carry consequences. Understand the process from start to finish, including interpreting and completing Form L-4029 to ensure the district is certifying the correct millage. Understand Headlee rollbacks and how to address those immediately, and what the truth-in-taxation notification process entails. Learn common pitfalls and errors related to tax levies and collections.
Presenter(s): Michael D. Gresens, Thrun Law Firm, P.C. and Howard Heideman, Michigan Department of Treasury

F11 — Indirect Costs
Learn how to properly get allowable reimbursements for your district programs. Find out how preliminary indirect cost rates are derived and what you use the final indirect rates for.
Presenter(s): Jessica Beagle and Philip Boone, MDE and Lori Schomisch, Clinton County RESA

F12 — Your Financials and Lease Agreements!
Do you have lease agreements that may need to be recognized in your school district financial statements? Not sure? Find out how GASB 87 will change your financial reporting and how you can get a jump on implementation for the 2021 reporting period!
Presenter(s): Nathan C. Baldermann and Kim H. Lindsay, Rehmann

F13 — MPSERS and Other Retirement Complexities
Each year it seems that planning for retirement becomes more difficult because of changes in the retirement system. Understand changes to healthcare coverage, income in retirement, and how changes impact active Michigan Public School Employees’ Retirement System (MPSERS) school district employees. Learn the importance of pre-planning your financial future, including MPSERS benefits and other investment options.
Presenter(s): Royce C. Humm, Michigan Association of Retired School Personnel (MARSP) and Richard E. Williams, Williams & Company, LLC

F14 — MiDEAL: An All Access Pass to Michigan Contracts
Gain an understanding of the MiDEAL program and how it satisfies and complements your district’s purchasing policy. Tour the MiDEAL website, Statewide Integrated Governmental Management Application (SIGMA) website, and the Vendor Self Service (VSS) website, including open contracts. Learn how to use the MiDEAL program to purchase at the same terms, conditions, and prices available to state agencies.
Presenter(s): Shawn Vaughn, Michigan Department of Technology, Management and Budget (DTMB)

F15 — Food As Medicine
We know the importance of providing a nutritious meal to our students as a way to enhance their readiness to learn. Let’s take it a step further and think about how food can impact our personal overall health. Learn how by increasing your knowledge of various foods and their beneficial aspects, you can improve your own health while becoming more knowledgeable of the benefits of the right foods for students.
Presenter(s): Barbara Minger, Gordon Food Service

F16 — Effectively Managing Contracted Service Arrangements
Learn key challenges with third-party services contract management and ways to combat them so that school districts may have effective contractual relationships and services. Learn how to extend current service providers and transition to new providers.
Presenter(s): Jeremy S. Motz, Clark Hill PLC

F17 — Ways to Prepare for Open Enrollment
Between benefit education, updating your Section 125 plan documentation, distributing required forms, and ensuring ineligible dependents aren’t costing you funds, the short time period of open enrollment packs a whole list of responsibilities. By investing time earlier, you can help prevent slip-ups before they
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SESSION F
occur. Consider seven strategies to help you sail through open enrollment stress-free!
Presenter(s): Lisa Stevens, American Fidelity

F18 — Merit Pay: Where Are We Now?
The Revised School Code, state School Aid Act, and the Public Employment Relations Act (PERA) all have provisions related to merit pay for certain school employees. Even though merit pay is addressed in these three laws, there are still some tricky and potentially costly issues that may arise. Learn the basics of what is merit pay, who needs merit pay, where should merit pay be included in employee contracts or board policy, when must merit pay be implemented, and why school districts must implement merit pay.
Presenter(s): Raymond M. Davis, Thrun Law Firm, PC.

F19 — Performance Evaluations: Giving and Receiving Constructive Feedback for Non-Instructional Staff
Learn to strengthen your ability to develop others around you by giving constructive feedback. Understand how and when to provide appropriate feedback to maximize professional and personal growth. Learn how to create meaningful and insightful evaluations, and how to develop appropriate goal setting processes and procedures.
Presenter(s): Sherrie Blankenship and Steve Pieska, Maner Costerisan

F20 — Payroll Pitfalls
Learn the most common payroll compliance issues school districts face and how to be compliant in your area. Learn how to analyze your processes to identify weaknesses.
Presenter(s): Megan Dongvillo, and Kathleen Hamilton, St. Joseph Public Schools

F21 — Top 10 Reasons Why Your District Loses FTE/Foundation Allowance Revenue
Full-Time Equivalent (FTE) is a school district's primary revenue source and counting students is essential to foundation allowance revenues. Learn the top 10 reasons why your district is losing FTE and foundation allowance revenue. Get strategies to help you maximize your revenue from FTE and minimize your mistakes.
Presenter(s): Brian Ciloski, MDE and Carolyn Claerhout, Oakland Schools

F22 — Permissible Expenditures
Districts often have a difficult time determining which expenditures from the general operating fund can be made. Can school districts use money to pay for food for board members at board meetings? Or make expenditures on various miscellaneous items? Are there restrictions on booster and activity clubs that run their funds through the district’s general operating fund, but are not 501c(3) organizations? Get detailed information on what is allowable and what is not.
Presenter(s): Dana L. Abrahams, Clark Hill PLC and Donna Hanson, Plante Moran

F23 — Maintaining One-to-One Technology: Lessons Learned
Now that every student has a device, how do you keep it that way? Discover best practices in maintaining one-to-one technology. Learn about long-term sustainability of your program. Understand options of replacing and/or disposing of equipment.
Presenter(s): David Tchozewski, Kenowa Hills Public Schools

F24 — Technology Director Roundtable: Workflow Management
Technology directors and departments have an ongoing laundry list of projects, challenges, and opportunities. Help tickets, routine tasks, and team and device management all need a process. Join us as we explore and share current workflow practices and tools through a round table conversation.
Presenter(s): Benjamin Rimes, Coloma Community Schools

F25 — Transportation Hot Topics Round Table
Join a facilitated discussion on best practices in pupil transportation. Hear colleagues talk about their challenges and successes. Talking with peers is beneficial to analyze issues. Rarely is an issue totally unique, and even if it is, discussing it with others in the business can often lead to solutions.
Presenter(s): Rob Selby, Warren Consolidated Schools

10:40 – 11:00 AM
Break/Passing Time

11:00 AM – 1:00 PM
Exhibit Show and Lunch
Lunch is served in the exhibit hall.

12:30 – 2:30 PM
SESSION G

G01 — Certification Wrap-Up/Ethics
Celebrate the completion of your certification program! Reflect on what you have learned and your role in the educational process and your school district. This class can be taken only if you are two classes or less from completing your certification (not counting the Wrap-Up/Ethics Session). Required: all tracks.
Presenter(s): David J. Hulings, Hulings and Associates, L.L.C.

1:00 – 1:15 PM
Break/Passing Time
1:15 – 2:30 PM
SESSION H

H02 — Investigating Student and Workplace Sexual Harassment Claims
It is critical that schools take action to investigate and remediate all sexual harassment claims. Understand applicable state and federal statutes, important state and federal court decisions and, provide guidance on appropriate policies and procedures for addressing these claims. Understand how to conduct internal investigations and reduce the risk of liability.
Presenter(s): Jessica E. McNamara and Cristina T. Patzelt, Thrun Law Firm, P.C.

H03 — Medicaid 101, Expansion, and 31n Grant
Are you confused about Medicaid like everyone else? School districts now have to administrate Caring 4 Students (C4S) and the 31n grant! Learn about the differences between the funding sources and how your district can benefit. Learn about resources available to help your district understand the funding and requirements of the programs.
Presenter(s): Dana Billings, Steve Ireland, and Amy Kanter, Michigan Department of Health & Human Services (DHHS)

H04 — Special Education: Hands On!
Review your district’s specific information in this hands-on session that explains maintenance of effort, excess cost, and district specific special education fiscal information. Pre-registration is a must as this will be limited to the first 25 districts registered!
Presenter(s): John Andrejack and Scott Kemmer-Slater, MDE

H05 — MSBO BMA: Mini Session
Have you considered participating in the MSBO Business Manager Academy (BMA) but you are not sure it’s right for you? Learn the program goals and get an insider’s look at the content covered with a “live” case study discussion — just like the real program! Beginning and seasoned school business officials are welcome!
Presenter(s): Douglas L. Newcombe and Timothy A. Raymer, BMA Facilitators

1:15 – 1:45 PM
SESSION I

I06 — Retro-Commissioning Can Bring Big Savings
Are your buildings out of sync? Changing occupant needs, space re-purposing, renovations, and aging systems all can contribute to a building that isn’t efficient. Learn how retro-commissioning helps overcome these building changes, improves environments, and decreases energy and maintenance spending — without large capital investments. If you’re a DTE Energy customer, you’ll also hear how to take advantage of incentives DTE is offering to help with the process.
Presenter(s): Laurie L. Catey, L.L. Catey Engineering Services, LLC

I07 — Keys to Good Key Control
It is still common to use keys to access district buildings. Everyone has stories of lost keys, lack of knowledge of who has keys, and improper personnel in possession of keys. Learn how to develop an effective key control system, along with steps necessary to clean up current processes.
Presenter(s): David L. Hood and Jeff Kartes, ASSA ABLOY

I08 — Let’s Talk About the MMC Graduation Requirements and the Personal Curriculum (PC) Flexibility.
The Michigan Merit Curriculum (MMC) graduation requirements allow for flexibility, yet they are underutilized. This has led to most students taking the same sequences of courses as every other student. Understand the 18 required credits of the MMC as well as the built-in flexibility to support changes when necessary. Learn the allowable modifications that can be made to graduation requirements to ensure all students are career and college ready while keeping the focus on their individual post-school goals.
Presenter(s): Rashell Bowerman, MDE

I09 — MSBO Dynamic Budget Projections Software
Projecting your budget can be tricky, but MSBO has you covered! Hear about the latest update and how you can use this simple solution to explain the impact bargaining, student loss, and revenue changes have on your district’s “bottom-line.”
Presenter(s): Christopher J. Frank, Bay-Arenac ISD

I10 — Food Service Data Dashboards
MDE has a multitude of data that is now available at your fingertips. Learn what the different data points mean, how to access them, and then how to use them to better serve the students in your district.
Presenter(s): Melanie Brummeler, MDE

I11 — Your Guide to Compliance Training
SET SEG and MSBO provide a complete guide for compliance training, combining mandated
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1:15 – 1:45 PM
SESSION I

training and education requirements in one booklet. Governing references, training schedules, personnel impacted by requirements, and the SafeSchools resource are all included in this comprehensive guide.
Presenter(s): Jamison Hagerty, SET SEG

i12 — Succession Planning: Finding Qualified Employees
Learn how to hire employees that have skills that meet your school district's needs. Create employee plans that take into account staff retirements and maintain continuity of services. Develop a plan that helps employees succeed. Learn how to invest in staff to build your district's expertise.
Presenter(s): Leander Rabe, Hulings and Associates, L.L.C.

i13 — Continuing Disclosure: Is Your District in Compliance?
Bond issues never seem to go away. Find out what your responsibilities are from the reporting aspects over the course of the repayment of your indebtedness.
Presenter(s): Dale Deis, PFM Financial Advisors, LLC

i14 — ORS Plans
Learn about all of the Michigan Office of Retirement Services (ORS) plans available through the MPSERS program to help you explain the different plans to employees.
Presenter(s): Josefina E. McCloud, Michigan Department of Technology, Management & Budget (DTMB)

i16 — Legal Documentation of Student Records
Students are becoming more transient. It is becoming necessary to review documentation requirements for students enrolling in and leaving your district. Learn best practices to ensure you can count students and avoid legal pitfalls of sending sensitive student record information to other districts. Understand what school of choice documentation is needed, what to keep in the CA60 and what information can be shared.
Presenter(s): Daniel R. Martin, Thrun Law Firm, PC.

i17 — A Comparison of Leasing vs. Buying
Learn about the pros and cons of leasing vs. buying and how to utilize a written replacement cycle plan for budgeting purposes and reporting requirements.
Presenter(s): Jeffrey Staley and Jeffrey Straus, Maner Costerisan

i18 — Get in the Know for Technology: Resources for Technology Directors
There are many resources available to you as a technology director. Explore different resources and learn how and when to use them, including professional development opportunities and connecting with peers.
Presenter(s): Jeffery Trudell, Wyandotte Public Schools

i19 — IT Vendor Fraud
Technology directors work with many vendors to secure the equipment and services for their district. Sometimes they are put in unexpected situations with vendors that may make it easy to fall into a fraud trap. Understand Information Technology (IT) vendor fraud and ways to mitigate those risks through necessary controls.
Presenter(s): Taylor Diener, Yeo & Yeo CPAs & Business Consultants

i20 — Electrifying School Buses
Electric school buses have been introduced in Michigan. Several districts have one. Will they become more common? Everyone expects pricing to come down, but do other aspects make them less effective? Learn the pros and cons of electric buses and best applications for current models.
Presenter(s): Richard Lee, The Lion Electric Company

i21 — Data Privacy and Security
Understand what schools should know about data privacy and security. Learn what laws apply, tips for agreements with service providers, and how to quantify the risks to understand the costs in an objective way and useful training tips.
Presenter(s): Charles M. Russman, Clark Hill PLC

1:45 – 2:00 PM
Break/Passing Time

2:00 – 2:30 PM
SESSION J

J06 — The Great Flooring Debate
There are more flooring choices than ever before — how do you know the right type of flooring for your specific spaces? Learn the various types of flooring and their respective applications. Discover the key considerations when deciding on the correct flooring choice, from installation to ongoing maintenance.
Presenter(s): Max Cavalli, Mannington Commercial

J07 — Understanding the Math of Solar Energy
Solar energy can be an attractive renewable energy source for many schools, potentially saving significant money in utility costs. Understanding how various solar companies structure programs from logistical and financial perspectives can be a bit challenging. Learn from our Michigan Schools Energy Cooperative (MISEC) representative how to assess the viability of solar, along with the financial calculations. Be prepared to ask the right questions and analyze the answers, increasing the chances of a good decision when it comes
to implementing solar in your district.

Presenter(s): Jeff Clark, Michigan Schools Energy Cooperative

J08 — Structuring Debt for Future Flexibility

Whether you are looking at a new money bond election or refinancing existing debt, districts should consider the impact of the debt structure on the future flexibility of the district and its long-term capital needs. Understand strategies to accommodate future capital needs and design your debt structure for lowest taxpayer impact.

Presenter(s): Matt Rudroff and Paul Stauder, PFM Financial Advisors, LLC

J09 — Bulletin 1022 Accounting Manual for New Business Managers

Learn the basics of the Bulletin 1022 public school accounting manual. Get an overview of the state requirements and how following the standard chart of accounts can help you better manage your district budget, accounting, and year-end reporting.

Presenter(s): Christopher May, MDE

J10 — Food and Nutrition Services Hot Topics Round Table

Join a facilitated discussion on best practices in school nutrition services. Hear colleagues talk about their challenges and successes. Talking with peers is beneficial to analyze issues. Rarely is an issue totally unique, and even if it is, discussing it with others in the business can often lead to solutions.

Presenter(s): Kerri Saltzgaber, Byron Center Public Schools

J11 — 403(b)/457 Plans

Understand 403(b)/457 plans and how to create successful plans that benefit your employees. Learn how to create uniform procedures for school district employees to learn about plans.

Presenter(s): Jamie Carnes, Ionia County ISD and Stephen R. Banks and Eric Miller, TSA Consulting Group, Inc.

J12 — School Safety and Crisis Management

Learn about Michigan’s current weapons law (guns in schools) and how to coordinate an effective strategy for student safety. Review Michigan’s law where it’s a district’s right to adopt its own policies concerning school safety and weapons on campus. Examine recent school district cases and best practices for complying with these new laws.

Presenter(s): Ashley N. Higginson, Miller Canfield

J13 — Arbitrage Rebate: Might Have to Pay Now!

The yield curve has inverted whereby short-term rates are higher than long-term rates. This yield environment provides the possibility for earning in excess of the arbitrage yield (including State Aid Notes!). Monitoring and meeting spending exceptions is critical. Understand exceptions and elections available to limit your liability and help you keep interest earnings, as well as understanding reporting requirements.

Presenter(s): Michael Steinbrook, PFM Asset Management, LLC

J14 — MDE/MA萨 ESW Update

Learn the purpose and scope of the work of the MDE/MA萨 Educator Shortage Workgroup (ESW). Understand the proposed elements of this short-term toolkit and receive an overview of the Workgroup’s long-term strategic plan.

Presenter(s): Tina Kerз, MASA

J15 — Wilkes University

MSBO has partnered with Wilkes University to provide another option for members to obtain a college degree that focuses specifically on school business administration. Learn how you can earn a Bachelors or Masters through this affordable online program.

Presenter(s): Charles Smargiassi, Wilkes University

J16 — Proper Pupil Accounting for Special Education Students

Special Education students require additional documentation to report them for pupil accounting purposes. Learn techniques to establish a well-documented process to ensure all Full-Time Equivalents (FTEs) are accounted for properly.

Presenter(s): Carrie Haubenstricker, Geneseo ISD

J17 — Get Control of Online Purchasing

Learn best practices in managing online purchasing for your school district. Learn how to guide purchasing practices within your district and establish effective internal controls.

Presenter(s): Practitioners

J18 — MICIP: What is it and what’s my role?

The Michigan Integrated Continuous Improvement Process (MICIP) is a pathway for districts to improve student outcomes by assessing whole child needs to develop plans and coordinate funding. Learn how business officials, technology leaders, and instructional staff will all play a critical role in the Mindset, Process, and Platform for continuous improvement.

Presenter(s): Tom Johnson, Michigan Data Hub and Theresa Nugent, MDE

J19 — SEN: Internet Statewide

Discover the savings that school districts can achieve by joining the State Education Network (SEN). SEN will connect 100% of Michigan’s intermediate, local public schools, and public school academies with the networking capacity needed to ensure that bandwidth is maximized for educational purposes.

Presenter(s): Kerri Saltzgaber, Byron Center Public Schools
is never a barrier to achieving goals in the classroom.

Presenter(s): Matthew A. Stark, Genesee ISD and Michigan Statewide Educational Network (MISEN)

J20 — Lease or Own: Best Practices for Financing School Buses
Learn the key data needed to determine if leasing makes sense for your district, or if other financing methods would prove more appropriate. Leasing can be an effective way to acquire buses, possibly reducing maintenance costs and breakdowns. Hear how best to analyze the decision.

Presenter(s): Steven A. Lenar, Holly Area Schools

J21 — At-Risk Funding Changes
Learn how the latest changes to at-risk funding impact your district’s program. Understand allowable expenditures, penalties, and strategies to ensure your district is in compliance.

Presenter(s): Representative, MDE

2:30 – 2:45 PM
Break/Passing Time

2:45 – 4:00 PM
Closing General Session, Business Meeting and Prizes
Stay until the end to be eligible for these prizes:

• 1 Night Stay from Courtyard by Marriott Downtown Grand Rapids
• 1 Night Stay, Midweek & choice of 18 holes of golf or lift tickets from Crystal Mountain Resort
• 1 Night Stay with valet parking from DoubleTree Detroit
• $100 Live Nation gift certificate donated by Experience Grand Rapids
• 1 Night Stay at The Grand Hotel, Mackinac Island
• $70 Gift Certificate to State Room Restaurant or Spartan Gift Shop donated by Kellogg Center MSU
• 1 Night Stay in Lakeview Hotel & 18 holes of golf from Shanty Creek Resorts
• 1 Night Stay from Comfort Inn & Suites, Mt. Pleasant
• 1 Night Stay from Holiday Inn & Suites, Mt. Pleasant
• 1 Night Stay from Park Place Hotel & Conference Center, Traverse City
• 1 Night Stay from Soaring Eagle Casino & Resort
• 1 Night Stay & breakfast from Somerset Suites, Troy
MSBO 82nd Annual Conference Registration Form

Register online: www.msbo.org

Name: ___________________________________________
MSBO ID: ____________________ PIC: ____________________
Title: ____________________________________________
School/Business: _____________________________________
Address: __________________________________________
City/State/Zip: ______________________________________
Phone #: __________________________________________
E-mail: __________________________________________

☐ I am also submitting the scholarship form
☐ 2019–20 MSBO membership (if not previously paid; $150 active, $300 associate primary, $150 secondary associate; membership expires 6/30/20)

☐ Special Physical/Dietary Needs (Please specify): __________________________

☐ Guest/Spouse Registration: (Please write name below) __________________________

Guest/Spouse registration includes all meals except Wednesday Lunch & Keynote (Cannot be a current MSBO member.)

Tuesday, April 21 Session Selection
Pre-Conferences • 8:30 am – 4:30 pm:
($170 members/$255 nonmembers early bird pricing)
($190 members/$285 nonmembers after 3/15/20)
$____

___110 ___120 ___130 ___150 ___160 ___170 ___180

Half Day Workshops
($85 members/$130 nonmembers early bird pricing)
($95 members/$145 nonmembers after 3/15/20)

1:15 – 4:30 pm
$____

___ 198 ___ 199

Certification Classes
($85 members/$130 nonmembers early bird pricing)
($95 members/$145 nonmembers after 3/15/20)

8:30 – 11:45 am
$____

___ 190 ___ 191 ___ 192 ___ 193

1:15 – 4:30 pm
$____

___ 194 ___ 195 ___ 196 ___ 197

Conference Registration April 22-23
☐ Full Conference Registration
($340 members/$510 nonmembers early bird pricing)
($380 members/$570 nonmembers after 3/15/20)
$____

☐ One-Day Registration
($170 members/$255 nonmembers early bird pricing)
($190 members/$285 nonmembers after 3/15/20)
☐ Wednesday ☐ Thursday
$____

Wednesday, April 22 Session Selection
☐ 201 — Yoga with Amanda • 6:00 – 7:00 am

Session A Certification Classes: 9:20 am – 12:20 pm
(Overlaps with B & C below)
Class Selected _______

Session A: 9:20 – 11:40 am (Overlaps with B & C below)
Class Selected _______

Session B: 9:20 – 10:20 am
Session Selected _______

Session C: 10:40 – 11:40 am
Session Selected _______

Extra Wednesday Lunch & Keynote Speaker
# of extra meal tickets ($35 each): ______

Extra ticket for guest or spouse $____

Thursday, April 23 Session Selection
☐ SET SEG Fun Run/Walk 7:00 am (MSBO will email you the form)

Session D Certification Classes: 8:20 – 11:20 am (Overlaps with E & F below)
Class Selected _______

Session E: 8:20 – 9:20 am
Session Selected _______

Session F: 9:40 – 10:40 am
Session Selected _______

Session G: 12:30 – 2:30 pm (Overlaps with H, i, & J below)

Certification Wrap-Up/Ethics class at no additional charge because I am registered for the Full Conference or Thursday only

Certification Wrap-Up/Ethics Only (Not registered for Full Conference or Thursday only) ($70 members/$105 nonmembers)$____

Session H: 1:15 – 2:30 pm (Overlaps with i & J below)
Session Selected _______

Session i: 1:15 – 1:45 pm
Session Selected _______

Session J: 2:00 – 2:30 pm
Session Selected _______

Payment Information

Total from items selected in both columns: $__________

Enclosed is a check made payable to MSBO

Purchase Order #: __________________________

Charge my: ☐ Visa ☐ MasterCard ☐ American Express

Cardholder’s name: __________________________

Credit Card #: __________________________
Expiration Date: ________________ CSV: __________________

Signature: __________________________

Please sign as it appears on your credit card.

Use your completed form to register online or mail your completed registration form with a check to: MSBO, 1001 Centennial Way, Suite 200, Lansing, MI 48917. Fax to: 517/327-0768. Email to: msbo@msbo.org. Questions: 517/327-5920. A $25 service fee will be charged for cancellations. No refunds are given for cancellations within two weeks of the event. Substitutions may be made at any time. Payment must be received by the date of the event or a $25 billing fee is assessed.
Scholarship Application
April 22 – 23, 2020
Amway Grand Plaza Hotel and DeVos Place
Grand Rapids

Check at least one box below:

☐ This is my first MSBO Annual Conference.

☐ I am within my first three years of employment in a school district.

☐ This scholarship will enable me to attend the MSBO Annual Conference, which I could not otherwise due to budget constraints in my district.

Fax or email this application by March 15, 2020 to:
Michigan School Business Officials at 517/327-0768
or email to msbo@msbo.org
Questions: Call Nancy Jungkans at 517/327-5920

Reason why you feel you should be selected for a scholarship:

___________________________________________________________________________________
___________________________________________________________________________________
___________________________________________________________________________________
___________________________________________________________________________________

Signature: Date: ____________________________

Supervisor’s Signature: Date: ____________________________

Please submit the scholarship form first. You’ll be contacted with further instructions on how to register. Scholarships can be applied to full conference or one-day registrations and are limited to one per district. Scholarships are not available for Tuesday registration. MSBO will notify you within two weeks of receiving your application. Scholarships available for Active members only.

Thank you to SET SEG for their donation to the MSBO scholarship program.
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