



Michigan School Business Officials

ANNUAL REPORT 2017-18

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2017-18 Board of Directors

The MSBO Board of Directors consists of nine voting members plus an Associate Member Representative and MSBO's Executive Director. The Board meets regularly throughout the school year and oversees the Michigan School Business Officials.

Officers



President
Steven G. Ezikian
Deputy Superintendent
Wayne RESA



President-Elect
Mike Hagerty, CFO
Assistant Superintendent
Administrative Services
Kent ISD



Immediate Past President
Tamera L. Powers, CFO
Chief Financial Officer
Byron Center Public Schools



Executive Director
David Martell, CPA, CFO
Executive Director
MSBO

Directors



Thomas L. Armstrong, CPA, CFO
Business Manager
Fulton Public Schools



Diane M. Block, CFO, Ed.S.
Assistant Superintendent
Alpena Public Schools



Kent J. Cartwright, CPA, CFO
Chief Financial Officer
Public Schools of Petoskey



William Chatfield, CFD
Director of Operations
Walled Lake Consolidated Schools



Deanna Mayer, CPA, CFO
Director of Finance and Human
Resources
Eastern Upper Peninsula ISD



Julie Omer, MBA, CPA, CFO
Chief Financial Officer
Owosso Public Schools



Associate Member Representative
Lisa Truscott
Chief Corporate Communications Officer
SET SEG

Membership & Member Involvement

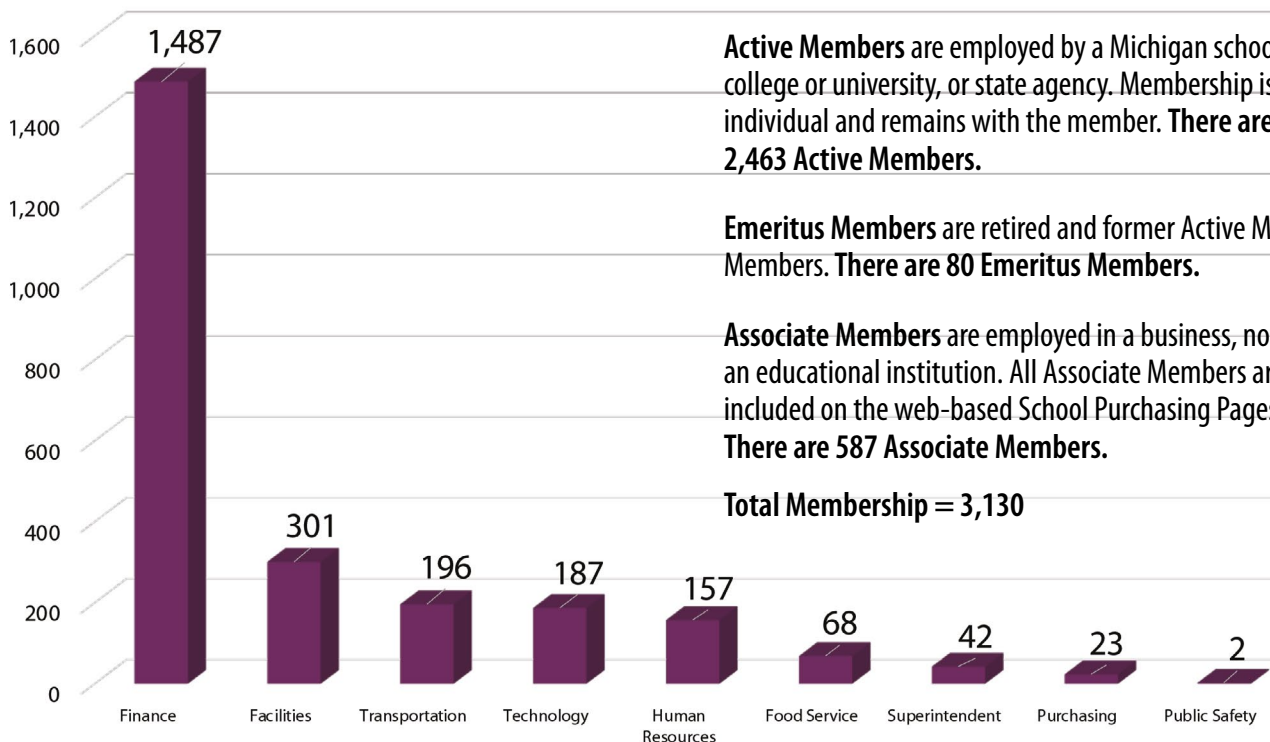
2017-18 Regional Presidents

Allegan County Amy Christman, CFO Allegan Public Schools	Grand Valley Catherine Kloska, CFO Muskegon Public Schools	Monroe/Lenawee Joshua P. Dyer, CPA, CFO Monroe County ISD	Saginaw Valley Sara Hegel, BOM Coleman Community Schools	Upper Peninsula Jason G. Auel, CFO Copper Country ISD Melissa Gillhooley, SPS Eastern Upper Peninsula ISD
Berrien/Cass/Van Buren Kathleen Hamilton, CFO Saint Joseph Public Schools	Lakeshore SBO Sharon Rushcamp, BOM North Muskegon Public Schools	Northern Michigan Shay Anderson, CFO Clare-Gladwin RESD	South Central Rachelle Roby, CFO Bronson Community Schools	Washtenaw/Livingston Sherri A. Papazoglou, MBA Washtenaw ISD
Central Michigan Julie Omer, CFO Owasso Public Schools	Macomb/St. Clair County Melanie Muchortow Port Huron Area School District	Northwest Michigan Michelle Meeder, BOM Mancelona Public Schools	Southwestern Ellen Hasse Berrien Springs Public Schools	Wayne County Alison Smith, CFO Livonia Public Schools
Genesee Area Danielle Templeton, CFO Genesee ISD	Middle Michigan Kevin Kolb, CFO Gratiot-Isabella RESD	Oakland County Michelle Schurman, CFO Madison District Public Schools	Thumb Region Allison Zimba Cass City Public Schools	Western Area James M. English, CFO West Ottawa Public Schools

2017-18 Committee Chairs

Program & Research Facilities Management Tim Peraino, CFO Kent ISD	Professional Development Neil R. Cassabon, CFO Warren Woods Public Schools	Transportation Thomas Moore Washtenaw ISD	Financial Review Robert Spagnuolo, CPA, BOM DeWitt Public Schools
Food & Nutrition Services Jessica Endres, CND Thornapple Kellogg Schools	School Finance Services Jill Mulders Bay City Public Schools	Administrative Bylaws and Resolutions Jason R. Helsen, SFO, CFO Reeths-Puffer Public Schools	Membership Steven Lenar, CFO Holly Area Schools
Intermediate School District Korinna Rafferty, CFO Calhoun ISD	Technology Richard Webb, CTO Fremont Public Schools	Elections Kent J. Cartwright, CPA, CFO Public Schools of Petoskey	Nominations Tamera L. Powers, CFO Byron Center Public Schools

Active Members



Who We Are

Active Members are employed by a Michigan school, college or university, or state agency. Membership is individual and remains with the member. **There are 2,463 Active Members.**

Emeritus Members are retired and former Active MSBO Members. **There are 80 Emeritus Members.**

Associate Members are employed in a business, not an educational institution. All Associate Members are included on the web-based School Purchasing Pages. **There are 587 Associate Members.**

Total Membership = 3,130

Program Highlights

80th Annual Conference & Exhibit Show • April 17-19, 2018
Cobo Center • Detroit



1,435

Participants

197

Topics

320

Presenters

320

Exhibit Booths

6 Pre-Conferences

- Facilities
- Finance
- Food & Nutrition Services
- Human Resources
- Technology
- Transportation

154

Breakout Sessions



Opening Super Session: Help Your District Improve Early Literacy — Dr. Nell K. Duke

Improving literacy requires leadership. Learn how we, as business officials, can do our part to support improvements in early literacy. Concrete steps that district administrators should take—and avoid—to improve early literacy outcomes in their districts will be identified. Given the importance of early literacy skills, there is no better time to revisit and intensify your district's literacy strategy. Leave with a better understanding of the problems and ideas to improve early literacy in your district as you work to finalize your budget.



Keynote: The Future of Education Byron Reese, Author Entrepreneur

An accomplished high-tech trailblazer, author, inventor, entrepreneur, and eternal optimist, Byron Reese will share his infectious sense of possibility and wonder, and his perspective as a historian, futurist, and technologist to illuminate how education should and will change to ensure students contribute in a world of radical technological change and daunting global challenges.

Program Highlights

Business Manager/CPA Workshop:
Provides timely information for practicing CPAs and business managers.

382
Participants

MDE/MSBO Workshop: Highlights the latest from the Michigan Department of Education on state aid and other hot topics.

291
Participants

Financial Strategies Conference:
Members learn the latest information on the economy, budget, state aid, legislation, and other hot topics just in time for budgeting and negotiations.

308
Participants

Annual Facilities/Operations Director Conference & Expo: School facilities represent a tremendous resource and responsibility for districts and those in operations & facilities require the knowledge and understanding of a myriad of issues.

285
Participants

Introduction to School Business:
Designed for new business officials (within the first few years of employment), office staff, and those who want a basic information refresher.

141
Participants

Group Solutions-Current Issues:

Provides hands-on business office self-assessment, discussion, and real-world problem solving. Attendees get straight talk and advice from other professionals facing the same issues.

61
Participants

MSBO Leadership Institute: The MSBO Leadership Institute is designed to help members reach that next level in their professional life.

26
Participants

New this Year – Business Manager Academy: “Engage through knowledge, application, and mentorship.”

MSBO partnered with skilled past and present business managers to share their knowledge and experience in school finance at MSBO’s first ever Business Manager Academy. The Academy provides in-depth, practical, “hands-on” working knowledge in school finance

12
Participants
Eastern Upper Peninsula ISD

15
Participants
Kent ISD

Alliance Building/Advocacy



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

MSBO’s long standing policy in legislative issues remains to be the role of providing facts, data, and testimony when requested by other groups or the legislature. MSBO staff represents members and the school community at a number of state agencies, department stakeholders groups, and other organizations, always providing expert input on numerous issues to address the needs of MSBO members.

MSBO Award Recipients

Distinguished Service Award: Paul J. Bodiya, Macomb ISD and Glenda Rader, Grand Ledge Public Schools

School Business Official of the Year: Robert F. Moore, Jr., Oakland Schools

Friend of Education: Brian Whiston, State Superintendent

Meridian Award of Excellence: Jon Barth, Berkley School District; Macomb ISD; Matthew Hess, Birmingham Public Schools; Geno Montayne, Wayne-Westland Community Schools; and Dexter Community Schools

President's Award: Mary E. Blackmon, Wayne RESA

Stebbins Scholarship: Tracy Clawson, Allegan Public Schools and Stacy Rick, Huron ISD

Piper Scholarship: Heather Carignan, Clarkston Community Schools and Jennifer Nelson, Greenville Public Schools

MSBO has created awards to help school districts celebrate successes and to recognize the extraordinary contribution of individuals to their school district and MSBO.

MSBO Voluntary Certification

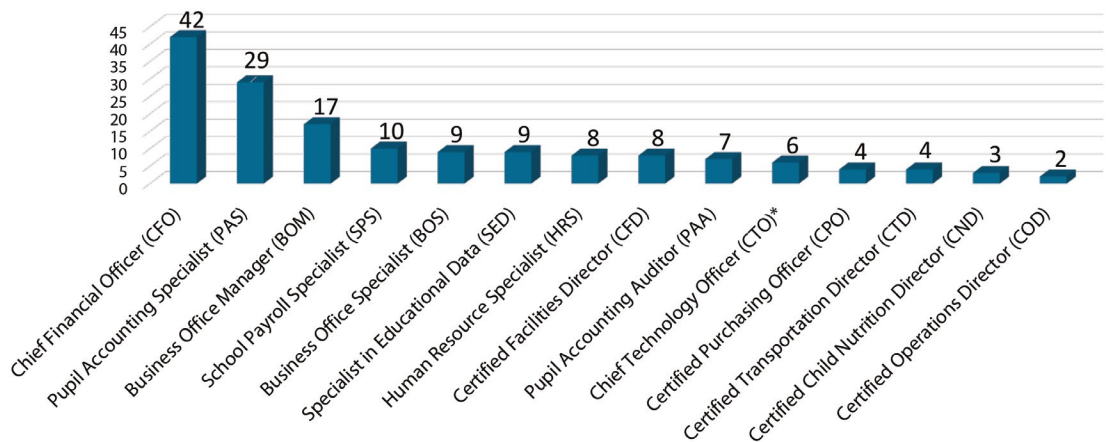
MSBO certification is a voluntary system providing focused training to school business officials offering practical information that will help school business officials succeed and excel in their employment.

The program is endorsed by both the Michigan Association of School Boards (MASB) as well as the Michigan Association of School Administrators (MASA). MSBO offers 14 separate certification tracks.

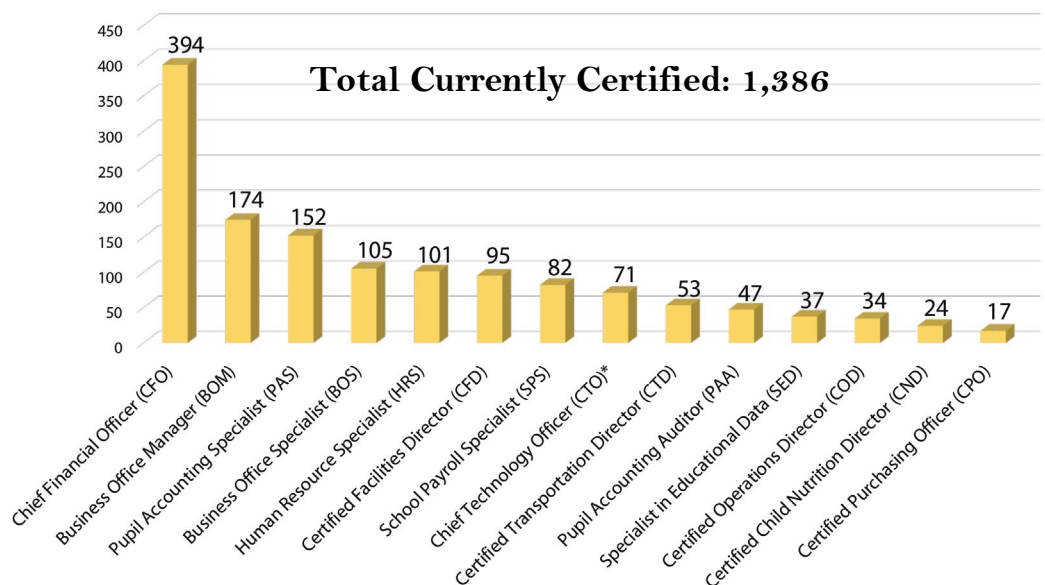
Since 1998, more than 2,600 members have earned a MSBO Voluntary Certification Award.

*Changed name in 2017-18 — formerly School Technology Management (STM)

Awarded 2017-18 = 158

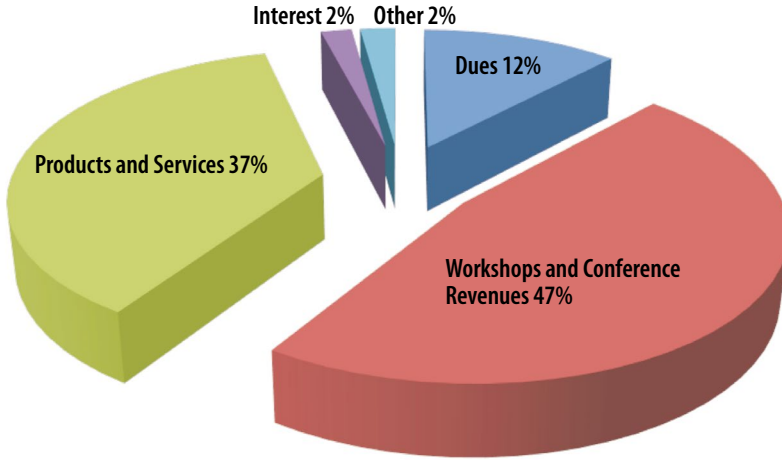


Total Currently Certified: 1,386



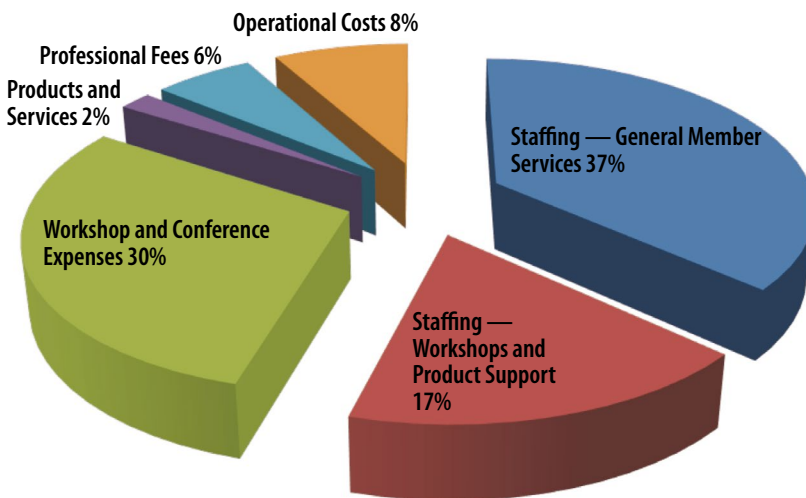
Financial Review

Revenues by Category



Dues	\$382,960
Workshops and Conference Revenues	1,503,315
Products and Services.....	1,172,993
Interest.....	60,461
Other.....	68,708
Total	\$3,188,437

Expenses by Category



Staffing — General Member Services.....	\$1,035,916
Staffing — Workshops and Product Support.....	496,459
Workshop and Conference Expenses	839,163
Products and Services.....	55,327
Professional Fees.....	168,685
Operational Costs	228,098
Total	\$2,823,648

Balance Sheet

Assets:

Current Assets	\$4,747,912
Furniture and Equipment	76,125
Investment in MELG.....	691,725

Total Assets **\$5,515,762**

Liabilities and Net Assets:

Current Liabilities	\$581,806
Net Assets:	
Designated	1,320,719
Other	3,613,237

Total Liability and Net Assets **\$5,515,762**

The Financial Review Committee met on September 28, 2018.

The Committee is comprised of:

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

MSBO President-Elect Tom Armstrong, MSBO Executive Director David Martell, MSBO Associate Executive Director Bob Dwan, MSBO Accountant Patty Lenneman, and Paul Bryant from Plante Moran were also in attendance.

The annual MSBO audit, conducted by Plante Moran, received a clean audit opinion. The Financial Review Committee voted to accept the report and recommended the full Board accept it. *The MSBO Board accepted the audit report.*

Business Solutions & Partnerships

ASBO — The Association of School Business Officials International



ASBO is MSBO's national/international organization. It provides programs and services to promote the highest standards of school business management practices, professional growth, and the effective use of educational resources. Founded in 1910, ASBO International has over 9,000 school business management professionals as members.

Certification Program



The MSBO Certification Program is a voluntary program designed by our own Professional Development Committee in conjunction with others in the educational community. It is endorsed by both Michigan Association of School Boards (MASB) as well as Michigan Association of Superintendents and Administrators (MASA). MSBO offers 14 separate tracks and provides essential information to school business professionals at the beginning of their careers and assures continuing professional development throughout.

Dynamic Budget Projections Software



This easy to use, simple to understand software is offered to school districts to use for financial forecasting. It provides multi-year budget projections in an Excel template. More than 500 districts and ISDs have purchased this software. It makes communicating financial information easier for school districts.

Michigan Liquid Asset Fund Plus (MILAF+)



In 1987, MSBO, MASA, and MASB collaborated to form the Michigan Liquid Asset Fund Plus program. Districts that utilize the many banking-related services such as check writing, investment of bond proceeds, online Internet services, and fixed term investing also take advantage of the Fund's AAAM rating, security, and liquidity. Currently 364 school districts and other public entities participate in this program.

Michigan Schools Energy Cooperative (MISEC)



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

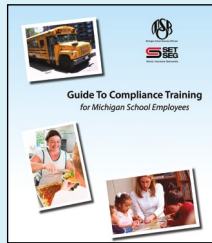
Business Solutions & Partnerships

MSBO Bus Program



The bus purchase program saves districts time and money by providing a competitively bid quality base bus with over 300 options to choose from. All the bidding has been done for MSBO members. The program is provided through an online platform making access and use very convenient.

MSBO/SET SEG Guide to Compliance Training



This guide is designed to help schools identify education and training that is required for Michigan schools. In an effort to make this guide as user friendly as possible, training is broken out by subject and by employee group. Every required training listed in the Guide also includes the governing reference, the training schedule, and the instructional courses available to help schools meet compliance obligations.

PaySchools



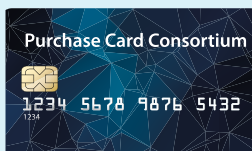
PaySchools is an online payment processing system that provides schools with an easy and efficient method to collect fees and receive electronic payments for school lunches, field trips, prom tickets, and any other school-related fees. PaySchools makes it possible for all schools to offer parents the convenience of online purchasing without incurring large administration or setup costs.

PublicSurplus.com



Michigan school districts have used PublicSurplus.com successfully for over a decade selling surplus and used items. It allows members to reach a national, even international audiences for buses, equipment, and anything else school districts may wish to sell.

Michigan Purchasing Card Consortium



The Consortium, similar to a credit card program, but better — allows school districts greater control of their expenses, saves time and money, and allows all districts to participate with the same, low fee structure. The 12th year was another great success for the program with districts earning approximately \$1,030,506 in rebates for the calendar year 2017.

Business Solutions & Partnerships

SafeSchools



SafeSchools is a partner with MSBO, MASA and MASB and is an online safety training and tracking system designed specifically for school employees. Save training dollars and increase the opportunities for your staff to receive quality, timely training through SafeSchools.com. With more than 180 online programs, SafeSchools offers a tremendous value to districts.

SchoolDude.com, Inc.



SchoolDude is the nation's number one provider of on-demand operations management solutions designed exclusively for the unique needs of schools, colleges, and universities. Their integrated suite of solutions for technology, business, and facility operations is revolutionizing the way educational professionals manage their organizations. SchoolDude's tools are easy to use and affordable; helping schools save money, increase efficiency, and improve services. MSBO's relationship provides significant discounts for Michigan school districts.

School Nutrition Association of Michigan (SNAM)



MSBO and SNAM continue a successful management partnership that started in 2013. MSBO provides administrative services, leadership assistance, and office space to SNAM. MSBO and SNAM have been closely affiliated for many years serving similar memberships. This partnership continues to benefit both MSBO and SNAM members.

U.S. Communities



U.S. Communities provides a national purchasing co-operative for local and state government agencies, school districts (K-12), higher education, and non-profits nationwide by pooling the purchasing power of over 87,000 public agencies.



Michigan School Business Officials

MSBO Mission:

The Mission of MSBO is to continually improve the leadership of and management in school business and operational services, while enhancing the professional, social, and economic well-being of its members.

MSBO Core Values:

- **The Value of Education.** We believe in the value of education. We will do all we can to support and enhance the delivery of education to Michigan's children.
- **Dedication to Leadership and Learning.** We believe each of us should be a leader and that effective leadership and management require a defined set of knowledge and skills as well as common sense. We will attend workshops and conferences and engage in other professional development activities that help us maintain and advance our knowledge. We will assist others in learning and ask questions of our colleagues when we need advice or information. We will approach all situations expecting to learn something.
- **The Power of Synergy.** We believe in approaching problems expecting to make a personal contribution to the solution and with the recognition that the best solutions are normally the result of working with others.
- **Commitment to Ethics.** We believe in operating our personal and professional lives in an ethical way that will reflect favorably on our schools and our profession. We believe we have a responsibility to act as stewards of our schools and to contribute to our communities and colleagues.

Based on these values, we believe in doing things right and in doing the right things.

1001 Centennial Way, Suite 200
Lansing, MI 48917
Phone: 517.327.5920 • Fax: 517.327.0768
www.msbo.org