



MICHIGAN SCHOOL BUSINESS OFFICIALS



Business Manager Academy

MSBO Conference April,
2024

Doug Newcombe, Tim Raymer, and Mark Klumpp

BMA Program Facilitators



What is the Business Manager Academy or BMA?

MSBO has partnered with past and present business managers to share their knowledge and experience in the areas of school finance, management, and leadership. Since its inception, the BMA has welcomed;

- Current Business Managers who wish to improve their knowledge and skills in school finance and leadership.**
- Aspiring business managers who wish to learn about the many features of business manager positions.**
- Other professionals working within the business office or district who wish to improve their knowledge about the business manager function and become a more valuable asset to the business manager and school district.**
- Other professionals such as superintendents and human resource directors who work with business managers or have some business service responsibilities .**

The BMA program is designed to provide opportunities through class discussions, real-world case studies and simulations, and one-on-one guidance from instructors on an as needed basis for specific situations.



Business Manager Academy History

- In 2017, the MSBO Board discussed the development of an advanced training program that would incorporate base knowledge, mentoring and the application of content. Through a subgroup of the Board and a planning committee, the concept became reality, and the Business Manager Academy was born!
- Doug Newcombe, Tim Raymer and Steve Gordon were engaged to develop curriculum, plan the sessions, and ultimately facilitate the first cohorts.
- Steve Lenar joined the team in 2019.
- Mark Klumpp joined the team for 2023-24.
- The BMA will have over 300 graduates by June 2024. Peer groups continue to meet even after graduation and BMA graduates continue to maintain contact and dialogue with each other to discuss issues and share information.



Original Development Committee Members

**Neil R. Cassabon, CFO
Deputy Superintendent
Warren Woods Public Schools**

**Robert Dwan, CFO, SFO
Associate Executive Director
MSBO**

**Stephen R. Gordon, CFO, STM
Human Resources/Finance Dir.
Eastern Upper Peninsula ISD**

**Sara M. Hegel, BOM
Business Manager
Coleman Community Schools**

**Jason R. Helsen, SFO, CFO
Finance Director
Reeths-Puffer Public Schools**

**Catherine L. Kloska, CFO
Business Manager
Muskegon Area ISD**

**Melodie Kociba, CFO
Business Manager
Bad Axe Public Schools**

**Abigail Lloyd, CFO
Finance & Operations Director
Allegan Area ESA**

**Jill Mulders
Assistant Finance Director
Bay City Public Schools**

**Douglas L. Newcombe
Emeritus**



Structure of the Business Manager Academy

- The BMA begins in August and ends in June. The sessions are:
 - **In-Person** – 1 session each month or 11 in total that typically begin at 9:00 a.m. and end at 3:00 p.m. at regional sites such as ISDs.
 - **Virtual** – 2 sessions each month or 22 in total that typically begin at 9:00 a.m. and end at Noon.
 - **Hybrid** – Combination of In-Person and Virtual structure depending on the monthly schedule.
- Depending on the topic, sessions include:
 - Discussion of participant/district specific issues and current matters impacting public education.
 - Discussion of curriculum materials for each program topic.
 - Discussion of real-world case topics based on the experiences of our instructors and also past BMA participants.
 - Hands-on activities such as a cash flow development, group negotiation simulation, and making budget presentations to the class.
 - Guest speakers and MSBO updates will also be provided at various times on real-time topics.



Structure of the Business Manager Academy

- **Course materials include documents in Sharepoint from past BMA cohorts, current information provided by facilitators, and the textbook “Understanding Public School Finance in Michigan,” sixth edition, written by Doug Newcombe who is also one of our facilitators as well as a Finance Handbook developed by same.**
- **Participants also receive access to the MSBD Dynamic Budget Projection Software for the current year.**
- **All materials will be provided to you electronically. Instructions on how to access and confirmation you accessed the information will be required.**
- **As a successful graduate you will be provided a Certificate of Completion, a Business Manager Academy jacket, and a peer group of BMA graduates for the rest of your career.**
- **The BMA is NOT designed to be a technical course for business office functions but is designed to provide information and suggestions that help business managers effectively utilize their education and skills more effectively. MSBD provides technical training through the CFO program and also various individual workshops and conferences.**



Topics for the Business Manager Academy Sessions

- **Developing Communications and Relationships** with superintendents, board members, unions, staff, parents, community, and others including navigating political situations in a positive way for you and your school district.
- **Leadership and Planning** in the business office and school district.
- **Auditing Preparation, Process and Considerations**
- **Budgeting Process and Considerations**
- **Cash Flow and Borrowing for Operations**
- **Capital Financing** such as bonds and sinking funds.
- **Understanding Human Resources** and the relationship with the business office.
- **Negotiating Collective Bargaining Agreements**
- **Support Services** such as maintenance, transportation, food service, and technology.



Example of Real-World Case Discussion Topic

You are in a management team discussion. Management team in your district consists of the Superintendent, Finance Director, HR Director, Curriculum Director, Technology Director, Facility Director, Grants/Student Director, and Transportation Director.

The Superintendent has initiated a discussion as to how to resolve a contract dispute with the custodians and maintenance staff. Everyone is aware that the District does not have money to give raises.

The Human Resource Director and Facility Director have reason to believe that the contract can be settled if the District offers 2 paid vacation days. They know from past discussions that you have issues with this because you believe other groups will then want this including 10 month support staff which becomes a problem of when to give them such days. And since the District pays for substitutes in a number of these positions, this is another added cost..... **What should you say or do in the meeting?**



Our Commitment at MSBO to Participants in the BMA

- **The MSBO Board is committed to maintaining participation in the program and has provided scholarships through the “MSBO Investing in Members” initiative.**
- **We have had many participants provide positive feedback on the Academy and how it has prepared them for their career. This isn’t just for new business officials. The curriculum is designed to provide “real world” experiences that can be enjoyed by all.**
- **Our facilitators regularly develop presentations, meet with participants and maintain communication with their cohorts. There are also occasions where meetings are planned for past cohort groups.**
- **MSBO staff provide constant feedback, guidance and resources to the cohort and facilitators.**
- **MSBO staff and BMA facilitators request feedback at the mid-point of each course and the end of the course and utilize that feedback to improve the structure and curriculum of the BMA.**



Expectations for Participants in the BMA

- **ATTEND** each in-person or virtual session during the course,
 - **REVIEW** the materials provided in Sharepoint and by facilitators throughout the course.
 - **ACTIVE PARTICIPATION** in class discussions.
 - **PARTICIPATE** in any prep work individually or with groups. Out-of-class work is minimal but there is some on occasions.
 - **UTILIZE** one-on-one contact with facilitators as needed for specific issues.
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- The BMA has been designed to provide a “safe environment” which allows for in-depth discussions of sensitive topics. Confidentiality of discussions is maintained, and assistance is provided through one-on-one guidance if needed.
 - While attendance is critical success in the program, it is understood that a situation may arise which prevents a participant from attending a session.. Please contact your facilitator ahead of the session and possibly schedule a follow-up conversation. Excessive absences will trigger exclusion from the program.
 - Our sessions can be online and/or in-person. If online, we want your cameras be on and your microphone muted unless talking. We understand the occasional blocking of video, but having visual contact is important.



Final Thoughts

- **The BMA agenda, topics, and materials are adjusted based on the needs of the participant needs in each cohort.**
- **Since the pandemic, our facilitators have adapted to include more focus on real-time problem solving related to district issues.**
- **Content is constantly updated and scheduled during sessions to correspond during times you are working on those specific functions during the fiscal year.**
- **When asking for guidance from facilitator either in session or during one-on-one mentoring, be sure to be open and honest about issues. We are here to help, not judge and your success is our goal.**
- **MSBO staff and facilitators are committed to meeting and exceeding your expectations of this program. Debbie Kopkau and Jason Helsen are available for any coordination issues, concerns or issues you may encounter. Reach out early before something becomes a problem.**



Business Manager Academy Enrollment Information

- Typically, the number and location of offerings each year depend on enrollment. Ideally, we have found that the BMA is most effective with between 15-20 participants in each group.
- Each year participants have the ability to enroll in either a hybrid offering that is part in-person and part virtual OR a completely virtual offering. There are occasions when a full in-person option may also be available.
- Program Fees are \$950 and includes all course materials, refreshment breaks and meals. You will be responsible for overnight accommodations (if needed) and travel expenses.
- Participants can choose between the following 2 options for professional development credit:
 - MSBO certification credit and pending approval, 3 graduate college credits through Saginaw Valley State University
 - SCECHs
- To Apply, visit the link at the MSBO website: <https://www.msbo.org/professional-development/business-manager-academy/>



THANK YOU FOR CONSIDERING JOINING THE BUSINESS MANAGER ACADEMY

- The BMA provides participants the opportunity to take their skill sets to a higher level.
- Future employers are looking for talented individuals and being a BMA graduate shows your commitment to professional development and a desire to learn.
- Feel free to contact any of the following MSBO staff or BMA facilitators if you have further questions:

	<u>Email address</u>	<u>Phone</u>
Robert Dwan, Executive Director MSBO.....	rdwan@msbo.org	517-327-2581
Jason Helson, Associate Executive Director.....	jhelsen@msbo.org	517-376-3087
Debbie Kopkau, Director of Certification, MSBO.....	dkopkau@msbo.org	517-327-2587
Doug Newcombe, BMA Facilitator.....	dmichigan059@gmail.com	989-239-9482
Tim Raymer, BMA Facilitator.....	timraymer24@gmail.com	616-893-0227
Mark Klumpp, BMA Facilitator.....	spcklumpp@moisd.org	231-629-2800



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QUESTIONS?????