

Michigan School Business Officials  
PROFESSIONAL DEVELOPMENT COMMITTEE  
Minutes for January 13, 2017  
1:30 pm – 3:00 pm NEW TIME

Called to order at 9:05 am

Attendees: Neil Cassabon, Warren Woods, Jason Helsen, Reeths-Puffer School District, Steve Gordon, EUPISD, Dena Mayer, Eastern UP ISD, Mary Beth Rogers, Clarkston Community Schools, Courtney Byam and Debbie Kopkau, MSBO.

Kopkau Secretary

Approve [Minutes](#) of November 9, 2016 conference call. Gordon moved. Helsen seconded. M/C

Old Business – Review of CFO and SFO requirements document. A side-by-side comparison was created.

Neil reviewed the comparison document:

**MSBO Chief Financial Officer Certification Program Recommendation to New Program  
January 13, 2017**

<i>Current Program</i>	<i>Recommended Changes</i>
<b>Bonding/Borrowing/Investing (3 hours)</b>	<b>Bonding/Borrowing/Investing (3 hours) – no change</b>
<b>Cash Management (3 hours) – no change</b>	<b>Cash Management (3 hours)</b> <ul style="list-style-type: none"> <li>Add content on managing the accounts receivable and accounts payable processes</li> </ul>
<b>Collective Bargaining Agreement, Contracts (3 hours)</b>	<b>Collective Bargaining Agreement, Contracts (3 hours) – no change</b>
<b>Effective Communication (3 hours)</b>	<b>Eliminate</b>
<b>Facilities for the Business Manager (3 hours)</b> Understand the basic structure and function of building, grounds and maintenance operations as well as the planning of maintenance programs. Learn about laws relating to school construction, environmental regulations, and what to expect from your facilities director.	<b>Facilities for the Business Manager (3 hours)</b> <ul style="list-style-type: none"> <li>Include fixed asset management and crisis management in content</li> </ul>
<b>Food Services for the Business Manager (3 hours)</b>	<b>Food Services for the Business Manager (3 hours) – no change</b>
	<b>Human Resources for the Business Manager (3 hours) – NEW CLASS</b>
<b>Instructional Program Evaluation (3 hours)</b>	<b>Instructional Program Evaluation (3 hours) – no change</b>
<b>Introduction to School Business (14 hours)</b>	<b>Introduction to School Business (14 hours)</b> <ul style="list-style-type: none"> <li>Add accounts receivable and government fund accounting as part of "Accounting Manual/Fund Accounting"</li> <li>Add written procedures/flow chart manuals as part of "Organizational and Site Office Issues"</li> <li>Add content on grant reporting (one hour recommended) as part of "Reporting State, Federal, and Local Agencies"</li> <li>The above changes could free up time to add additional time in the "Retirement" section and remove the "Managing Transportation/Food Service/Facilities" section on the current agenda.</li> </ul>

<b><i>Current Program</i></b>	<b><i>Recommended Changes</i></b>
<b>Labor Relations/Employment Law (6 hours)</b>	<b>Labor Relations/Employment Law (6 hours) – no change</b>
<b>Payroll and Related Personnel Issues (3 hours)</b>	<b>Payroll and Related Personnel Issues (3 hours)</b> <ul style="list-style-type: none"> <li>• Add content on managing employee benefit programs</li> </ul>
<b>Principles of Education (3 hours)</b>	<b>Principles of Education (3 hours) – no change</b>
	<b>Property Tax Overview (6 hours) – NEW CLASS</b>
<b>Purchasing Overview (3 hours)</b>	<b>Purchasing Overview (3 hours) – no change</b>
<b>Revenue, Expenditures and Budgeting Part I (6 hours)</b> <b>Revenue, Expenditures and Budgeting Part II (6 hours)</b>	<b>Revenue, Expenditures and Budgeting Part I (6 hours)</b> <b>Revenue, Expenditures and Budgeting Part II (6 hours)</b> <ul style="list-style-type: none"> <li>• No longer refer to as Part I and Part II</li> <li>• Add section on "Managing Budgets" to cover different methods of enrollment projections, developing financial goals, addressing estimation of expenditures, reductions through improved efficiencies and budget adjustments</li> <li>• More emphasis and time dedicated to the current "Part II" topics and less on "Part I"</li> </ul>
<b>Strategic Planning (3 hours)</b>	<b>Strategic Planning (3 hours)</b> <ul style="list-style-type: none"> <li>• Add content on developing financial goals as an organization and how to develop a budget around those goals</li> </ul>
<b>Team Leadership (3 hours)</b>	<b>Eliminate</b>
<b>Technology for the Business Manager (3 hours)</b>	<b>Technology for the Business Manager (3 hours)</b> <ul style="list-style-type: none"> <li>• Add content on the financing of technology and data encryption in email</li> </ul>
<b>Transportation for the Business Manager (3 hours)</b>	<b>Transportation for the Business Manager (3 hours) – no change</b>
<b><i>Current Program</i></b>	<b><i>Recommended Changes</i></b>
<b>Wrap-Up/Ethics (2 hours)</b>	<b>Wrap-Up/Ethics (2 hours) - no change</b>

<b>Electives (6 hours)</b>	<b>Electives (3 hours) – Reduce</b>
<b>Total 85 hours</b>	<b>Total 85 hours</b>
<b>Renewal – 137 hours and 13 hours of Group Solutions</b>	<b>Renewal - Change Group Solutions requirement to one and then require one "Financial Statement Preparation" session.</b>

Kopkau mentioned the elimination of Effective Communications thinking this may be sending a message to other tracks that this is not important. Helsen mentioned that most CFO's are either entering the Leadership Institute or have this background. This seemed also the same for Team Leadership. They can always take the class as an elective.

Omer had emailed in making sure we were covering rules, regulations and uses of sinking funds within education. This is covered in Bonding/Borrowing/Investing and could be added to Technology because of the sinking funds.

On the Revenue, Expenditures and Budgeting would be created into a two-day class and no longer Part I & Part II. 12 hours total not 6 hours each.

Mayer felt that we may get some push back on the addition of the Financial Statement Preparation because many business managers may come from public accounting so they are always aware of this content in the Financial Statement Preparation. Rogers felt that most people are waiting until the last year and then taking both Group Solutions back-to-back.

Gordon mentioned flexibility in the renewal classes. Maybe they could choose Group Solutions and maybe Financial Strategies.

Cassabon mentioned that we should add the notes and share the comments with Bob and Dave to see what they believe may need to be re-thought through before sharing with the board.

**Next Meeting – February 8 – Conference Call – 9:00 am**

Respectfully submitted,

Debbie Kopkau, MSBO