

Michigan School Business Officials  
PROFESSIONAL DEVELOPMENT COMMITTEE

Minutes for March 1, 2017

9:00 am – 11:00 am

Called to order at 9:05 am

Attendees: Neil Cassabon, Warren Woods, Julie Omer, Owosso Public Schools, Teri Les, Walled Lake Consolidated Schools, Penny Morgan, Taylor School District, Dena Mayer, Eastern UP ISD, Mary Beth Rogers, Clarkston Community Schools, Debbie Kopkau, MSBO.

Kopkau Secretary

Approve [Minutes](#) of January 13, 2017 Rogers moved. Morgan seconded. M/C

New Business – The committee discussed and doesn't feel we have control over the regional groups' content and think that the Group Solutions is worth doing. If not the Group Solutions, the person could take the Leadership Institute instead of two Group Solutions. The rest of the committee agreed and is denying the request.

Old Business – Review of CFO and SFO requirements document. A new side-by-side comparison was created which included the rationale for the changes.

Neil reviewed the comparison document.

### **Effective Communications Rational**

- Omer mentioned that we could change other content to make sure effective communications content is covered. Add communications to Financial Statement Preparation because communicating of financial information to board and community is important.
- We felt that the content of communication is inherent in other classes and be sure to add communication as a component of Revenue Part I & Part II.
- Morgan feels that it could be eliminated as long as we incorporate communications in all other classes.
- Will still be available as an elective for anyone who feels they need to work on those skills.

### **Introduction to School Business Change**

- Eliminate Transportation and Facilities because it is covered in Organizational and Site Offices section.

## **Revenue Part I & Part II Change**

- Committee will work on the agenda for the Revenue Part I & Part II. Debbie will have a draft ready for next meeting.

## **Team Leadership Rationale**

- The class could remain but it would increase the hours. Unsure of how the board feels about the additional hours. The initial charge of this review was to match it with the SFO program and this content is not in the SFO.
- Omer felt that we have to always be sensitive to the financial resources and the time resources of Districts and members.
- Course could also be taken as an elective moving forward for any member interested in working on those skills.

What is the message we are sending if Effective Communications and Team Leadership are eliminated? We require BA degree, 18 semester hours, and no grand parenting for CFO certification which already sets this certification track apart from the others it should send a message at all if there are a couple of additional items that are different.

Mayer mentioned that she was making notes and would help the board with more rationale when it comes that time. Cassabon was willing to meet with the board to also to explain if needed.

## **Elective Change**

- Reduced to maintain the existing 85 hours. Concerned with the financial and time commitment. Elective credit can be gained by going to the Effective Communications and Team Leadership.

## **Add additional rationale for Group Solutions changes.**

- Financial statements do tend to change at least every five years and to require members to attend the Financial Statement Prep class once during each of their renewals will make sure they are current on the latest changes.
- This is also important for the current auditing standards to be able to say that members are capable of producing their own financial statements if their auditors are currently preparing them.

Next meeting review agenda for Revenue Part I & Part II. Have Dave and Bob review the changes. Finalize the rationale to take to the board in May.

Meeting adjourned at 10:03 am.

**Next meeting April 5 at 9 am.**

Respectfully submitted,

Debbie Kopkau