

# 64th ANNUAL SWMSBO 2018 CONFERENCE SESSIONS

## Sessions #1 8:30 – 9:30 a.m.

- Ethics & Fraud – Prevention in Schools** **Room 204**  
**Molly R. Fish, CPA-Manager Accountant – Yeo & Yeo, CPAs & Business Consultants**  
Learn about recent fraud cases at Michigan school districts and what you can do to prevent them from happening at your district.
- What's New For Districts?** **Room 205**  
**Jeffrey Staley & Steve Piesko, Shareholders – Maner Costerisan PC**  
Addressing the 3% refunding, GASB 75 – Recording the unfunded retiree health benefits (OPEB), GASB 84-Fiduciary Activities and GASB 87-Leases.
- The State of Health Care: The Legislative Landscape and Benefit Strategies** **Room 208**  
**Heather Menzies, SET SEG**  
While the Affordable Care Act lies in legal limbo and health care costs continue to rise, business offices need guidance to know how to stay in compliance, keep costs down, and anticipate what is on the health care horizon. Learn the latest in ACA information and updates, tidy your HR housekeeping tactics, and secure strategies for bidding and other important benefit administration considerations.
- Educating Staff on Retirement Preparedness** **Room 209**  
**Richard E. Williams, President – Williams & Company**  
Educating staff on retirement preparedness and supplemental retirement options.
- Connecting the HR Dots** **Room 210**  
**Tom Zahrt, Asst Supt HR & Communications – KRESA**  
Connecting all the HR systems/tools to your organizations mission, vision and goals so that you accomplish them.
- Life Lessons and Leadership** **Room 211**  
**Ed Stasiak, KSS Vice President**  
Learn from an experienced businessman about four life lessons that have influenced his leadership style and how they have been used to grow several organizations.
- Productivity 2.0** **Room 212**  
**Brian Schupbach, Director of Technology - KRESA**  
Working in K12, you can often feel overwhelmed by all of the different tasks, problems, and projects that land on your plate. When you are in that state, even the most conscientious person will struggle to feel productive and end up missing important details. In this session, you will be introduced to a productivity system that is air-tight, will allow you to clear your mind, lower your stress, and be more productive than ever you ever thought possible.
- Things You Wish You Knew When You Renew** **Room 213**  
**Mark Williams, Eastern Region VP/Jason Rushton, Employee Benefits Consultant/Brian Mitchell, Market Development National Insurance Services (NIS)**  
A behind the curtain look at how your rate renewal (medical, dental, vision, life/ltd) is developed and what you can do to ensure you are getting the best rates possible.
- Office of State Aid and School Finance Update** *(Repeated at Session #2)* **Room 242**  
**Christopher May, Phil Boone, Jessica Beagle – MDE Office of State Aid**  
Get the latest information on state aid and school finance in Michigan. Topics covered will include accounting and financial reporting updates, the State School Aid budget, indirect costs, and other current topics. There will also be plenty of time for questions and answers.
- Leveraging Technology to Streamline Business Processes** **First Floor (Downstairs) Room 105**  
**Evan Fiddler, Director of Enterprise Software – Applied Imaging**  
Discover how schools and businesses have transformed their work, enhanced their current systems, and saved time and money by rebuilding their processes and workflows from the ground up. Small and large tweaks alike, we'll take a look at how to go about making changes to add efficiency to your work.
- Fund Balance Investment Options Overview** **First Floor (Downstairs) Room 107**  
**Mark Rochford, Senior Managing Consultant - UMBAUGH**  
With interest rates on the rise, this session will give you a good overview of the options available for investing and growing your fund balance you will also find out which options may be the best in the current market.

## Sessions #2 9:35-10:35 a.m.

### **Accounting & Auditing Update**

**Room 204**

**Molly R. Fish, CPA-Manager Accountant – Yeo & Yeo, CPAs & Business Consultants**

Hear about the latest auditor identified issues and upcoming changes for your 2018 audit.

### **District Insurance Basics**

**Room 205**

**Darci Muller, PC/WC Account Executive, Deanna Coolidge – SET SEG**

Managing your district's insurance programs is a bigger task than you may think! Knowing where to go for information, what to do in an emergency, and what types of coverage you have are all areas of concern. Get an overview of important coverages – including property, cyber/data breach and builder's risk – that you need to understand to assess your needs and protect your district from potential losses.

### **REP – What's It All About?**

**Room 208**

**Caitlin Groom, Sr. Data Collection Analyst & Trevor Youngquist, Data Collection Analyst – Center for Educational Performance & Information (CEPI)**

This session will include an overview of the REP Application, including new information for the EOY 2018 submission, the data submission process (bulk upload and online single submission), data certification, Educator Effectiveness Appeals, REP On-Demand Functionality, the TSDL connection, and REP Data Quality process.

### **Googlus Maximus** *(Repeated at Session #3)*

**Room 209**

**Ben Tomlinson-Van Buren ISD**

The goal is maximum efficiency with Google! Explore connected apps that will streamline your work by automating processes that you use every day. Designed for the beginner, intermediate and even advanced Google user. Come see how far down the rabbit hole you are willing to go. Please bring your curiosity!

### **Office of Retirement Services Update**

**Room 210**

**Josey McCloud, Customer Education & Bobby Hoppes, Employer Reporting**

The Office of Retirement Services will provide an update on the new and exciting things going on at ORS—all the hot topics.

### **Legislative Update** *(Repeated at Session #3)*

**Room 211**

**Jennifer Smith, Director of Government Relations – Michigan Association of School Boards (MASB)**

Get the latest updates on what's happening at the Capitol.

### **Workplace Harassment**

**Room 212**

**Katie Vujea, Attorney – Thrun Law Firm**

A look at preventing workplace harassment in the school environment and tips on conducting an investigation.

### **Purchase Cards**

**Room 213**

**Patricia A. Velie, Director of Finance & Operations – Wayland Union Schools**

A look at best practices for managing a purchase card program.

### **Office of State Aid & School Finance Update** *(Repeated at Session #3)*

**Room 242**

**Christopher May, Financial Analyst, Phil Boone, Assistant Director, & Jessica Beagle, Financial Analyst – Michigan Department of Education (MDE)**

Get the latest information on state aid and school finance in Michigan. Topics covered will include accounting and financial reporting updates, the State School Aid budget, indirect costs, and other current topics. There will also be plenty of time for questions and answers.

### **Best Practices for Cyber Security**

**First Floor (Downstairs) Room 105**

**Andrea Selke, Associate - Plante Moran**

Cyber-attackers are constantly victimizing organizations, and schools are key targets. This session will discuss what business managers need to know about the threat of cyber-attacks and how to actively monitor internal controls. You'll learn best practices and common oversights organizations make in regards to information security.

### **Budgeting Basics**

**First Floor (Downstairs) Room 107**

**Don Sovey, CPA, CFO – School & Municipal Advisory Services, PC**

Learn the basics of budgeting, budget process options and best practices.

## Sessions #3 11:20 a.m. - 12:20 p.m.

- WorkFit – How to Stay Healthy at Work** **Room 204**  
**Julie Blodgett, PT, Wellness Director – Northern Physical Therapy**  
Join Julie Blodgett, Physical Therapist for an interactive presentation on ways to incorporate healthy living into our work life. We will discuss office ergonomics, sitting posture, healthy snacks and lunches for people on the go and even exercises that you can do at your desk throughout the day.
- MPSERS Defined Contribution Plans-Tips for Educating Your Employees** **Room 205**  
**Heidi Schiller, Vice President & Colleen Beaumont, Plan Consultant – VOYA**  
How the MPSERS Pension Plus, Pension Plus 2, Defined Contribution Plan, and Personal Healthcare Fund work. How to bring Voya’s education services to your school/location of choice including: On-site seminars, 1:1 appointments with participants to provide a current assessment of their risks, goals and objectives along with advice on how much to save and how to invest. How to instruct participants to register for webinars and what offerings are available. Resources for new participants including those within their 75-day plan election window. Important contact information and resources for MPSERS participants
- Intermediate Excel Tips & Tricks** **Room 208**  
**Lois Jones, Regional Administrative Manager – RE/MAX of Michigan**  
Intermediate Excel Tips & Tricks, along with an introduction to Pivot Tables & Dashboards
- Googlus Maximus** *(Repeated at Session #2)* **Room 209**  
**Ben Tomlinson-Van Buren ISD**  
The goal is maximum efficiency with Google! Explore connected apps that will streamline your work by automating processes that you use every day. Designed for the beginner, intermediate and even advanced Google user. Come see how far down the rabbit hole you are willing to go. Please bring your curiosity!
- Office of Retirement Services Payroll Processing Update** **Room 210**  
**Josey McCloud, Customer Education & Bobby Hoppes, Employer Reporting**  
Get the latest updates and tips about the payroll processing guidelines.
- Legislative Update** *(Repeated at Session #2)* **Room 211**  
**Jennifer Smith, Director of Government Relations – Michigan Association of School Boards (MASB)**  
Get the latest updates on what’s happening at the Capitol.
- Labor Negotiations** **Room 212**  
**Ray Davis, Attorney – Thrun Law Firm**  
Get the latest updates on negotiation issues and legislation.
- Benefits & Beyond: Changes and Issues to Watch for Starting in 2018** **Room 213**  
**Charles M. Russman, Attorney – Clark Hill PLC**  
How the Tax Act changes the Affordable Care Act and what that means for you and your employees: updates on withholding changes for 2018; other Tax Act changes to benefits and changes to existing benefits; and pitfalls to avoid and lessons learned: a look at recent enforcement and problems our clients have been facing.
- Stress Buster** **Room 242**  
**Rhonda Jones, Health Promotion Consultant - MESSA**  
Are you tired, lack motivation or unable to achieve your health goals? Join Rhonda Jones, MESSA's Health Promotion Consultant as she shares how unmanaged stress can negatively affect your health. She will share tips on how good nutrition, fitness and a healthy mindset can help you achieve that optimal level of well-being you have been seeking.
- Fraud Issues in the K-12 Environment** **First Floor (Downstairs) Room 105**  
**Michelle McHale, Partner, Forensic Accounting Practice Leader – Plante Moran**  
Learn about real life fraud situations in the governmental world, what to be skeptical of and best practices to mitigate your risk.
- Redesigning Finance and Human Resource Office Structure to Meet Today’s Challenges** **First Floor (Downstairs) Room 107**  
**Don Sovey, CPA, CFO – School & Municipal Advisory Services, PC**  
This session will examine necessary leadership and staffing for local districts to effectively deliver financial and human resource services for schools ranging in size from 1,000 to 15,000 students. The changing role of the ISD will be discussed. Case studies and recommended staffing models will be presented.