



Michigan School Business Officials

ANNUAL REPORT

2020-21

2020-21 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
William Chatfield, CFD
Director of Operations
Walled Lake Consolidated Schools



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



Immediate Past President
Steven Ezikian
Deputy Superintendent
Wayne RESA



Executive Director
David Martell, CPA, CFO
Executive Director
MSBO

Directors



Brian Marcel, CFO
Assistant Superintendent,
Administrative & Support Services
Washtenaw ISD



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



Sharon Raschke, Ed.D, MBA, CFO
Chief Financial Officer
Dexter Community Schools



Mary Beth Rogers, Ed.S, CFO
Executive Director of Business Services
Clarkston Community Schools



Stephanie Weese, CFO
Assistant Superintendent for
Administrative Services
Livingston ESA



Julie Williams-Muz, CPA, CFO
Finance Director
Huron ISD



Associate Member Representative
Ed Stasiak
President
KSS Enterprises

Membership & Member Involvement

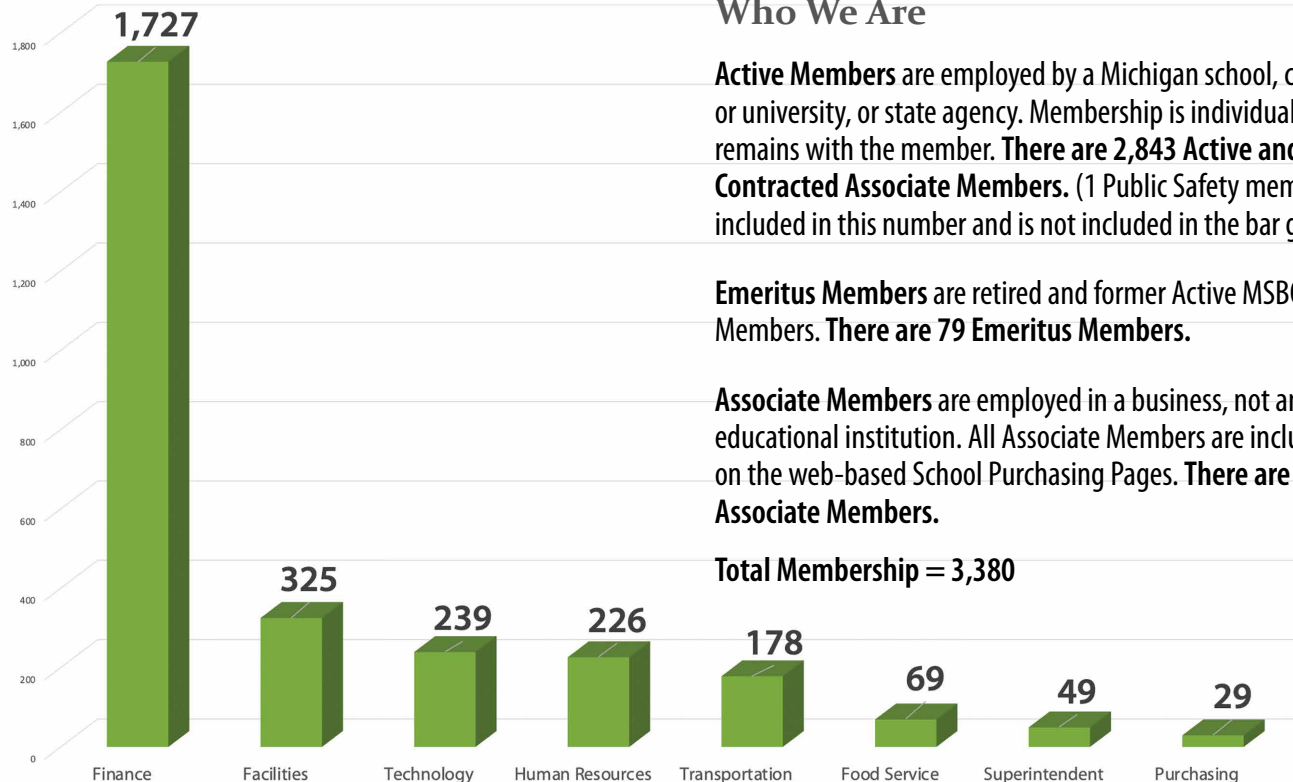
2020-21 Regional Presidents

Allegan County John Solomon, CFO Allegan Area ESA	Grand Valley Jasen Rademacher, CFO Saugatuck Public Schools	Monroe/Lenawee Sharon E. Smith, CFO Sand Creek Community Schools	Saginaw Valley Sarah Glann, CFO Meridian Public Schools	Upper Peninsula Jason G. Auel, CFO Copper Country ISD	Western Area Christine A. Marcy Jenison Public Schools
Berrien/Cass/Van Buren Sara Ashley, BOM Coloma Community Schools	Lakeshore Tracey French, CFO Reeths-Puffer Public Schools	Northern Michigan Michael Boensch, CFO Hale Area Schools	South Central Lori Mayo, BOM Michigan Center Schools	Washtenaw/Livingston Brian Marcel, CFO Washtenaw ISD	
Central Michigan Adrienne Barna, CFO Ionia Public Schools	Macomb/St. Clair County Keith Bishop, CFO Croswell-Lexington Schools	Northwest Michigan Nadia L. Hoover, CFO Northwest Education Services	Southwestern Robert J. Wiersema, III, CFO Gull Lake Community Schools	Wayne County Shawn M. Stirling, CFO Gibraltar Schools	
Genesee Area Kelly Stearns, CFO Flushing Community Schools	Middle Michigan Kevin J. Kolb, CFO Gratiot-Isabella RESD	Oakland County Geoffrey VanGoethem, CPA, CFO Huron Valley Schools	Thumb Region Candice M. Halifax, CFO Huron ISD	Western Area Christopher D. Lamer, CFO Ottawa Area ISD	

2020-21 Committee Chairs

Program & Research Facilities Management Shawn Hayward Rockford Public Schools	Intermediate School District Kevin J. Kolb, CFO Gratiot-Isabella RESD	Technology Richard Webb, CTO Fremont Public Schools	Administrative Bylaws and Resolutions Jason R. Helsen, SFO, CFO Muskegon Area ISD	Membership Steven A. Lenar, CFO Holly Area Schools
Food & Nutrition Service Kerri Saltzgaber (Wright), BOM, CND Byron Center Public Schools	Professional Development Neil R. Cassabon, CFO Warren Woods Public Schools	Technology Fred Sharpsteen, CTO Mecosta-Osceola ISD	Elections Sharon Raschke, CFO Dexter Community Schools	Nominations Steven G. Ezikian Wayne RESA
	School Finance Services Stacey Viers, CFO, CPA, SFO Huron ISD	Transportation Rob Selby, CTD Warren Consolidated Schools	Financial Review Robert Spagnuolo, CPA, CFO, BOM DeWitt 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 2,843 Active and Contracted Associate Members.** (1 Public Safety member is included in this number and is not included in the bar graph)

Emeritus Members are retired and former Active MSBO Members. **There are 79 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 458 Associate Members.**

Total Membership = 3,380

Program Highlights



82nd Annual Conference & Exhibit Show



*Virtual Live Sessions April 21-22
On Demand Viewing Through June 2021*

The COVID-19 pandemic impacted MSBO meeting in person for our Annual Conference but the Conference moved forward with a virtual conference with two days of “Live” sessions and “On Demand” sessions, as well as a virtual exhibit show. The “live” sessions were recorded for viewing on demand through June 2021. Attendees had the opportunity to meet in a designated Networking Lounge, which allowed them to connect with other registrants and exhibitors.



This year’s keynote was motivational speaker Christine Cashen who delivered her refreshing take on everyday life. Cashen is a former Michigander who is an author of two books, has been speaking for over 20 years, and was inducted into the Speaker Hall of Fame. She shared the keys to having more fun, improving productivity and morale, while at the same time lowering stress and improving job satisfaction!

1,346
Registrants

124
Exhibitors

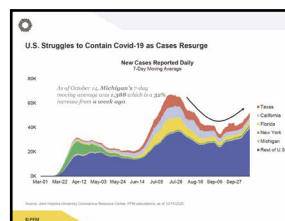
186
Topics

314
Presenters



Virtual Town Hall and Committee Meetings

One step MSBO took to help bring members together became the “Town Hall” and virtual committee meetings. In these times of such great uncertainty, the ability of members to connect with peers and address issues they were facing in their districts was immeasurable.



Financial Market Updates

PFM Asset Management LCC, provided bi-weekly market updates focusing on the market impact of COVID-19, managing school budgets, and preparing for bond sales in an uncertain economy.

Program Highlights

All MSBO professional development programs were held virtually as a cautionary measure because of the COVID-19 pandemic.

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

458
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.

170
Participants

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

424
Participants

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

21
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.

354
Participants

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. The Academy provides in-depth, practical, “hands-on” working knowledge in school finance. Participants in 3 Regions across the state.

33
Participants in
Two Regions

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.

128
Participants

MSBO’s Voluntary Certification Program provides focused training for school business officials and offers practical information that provides business officials a base of knowledge about laws, regulations, and procedures for functioning in Michigan schools. Certification classes are held throughout the year.

2,545
Participants

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 Voluntary Certification

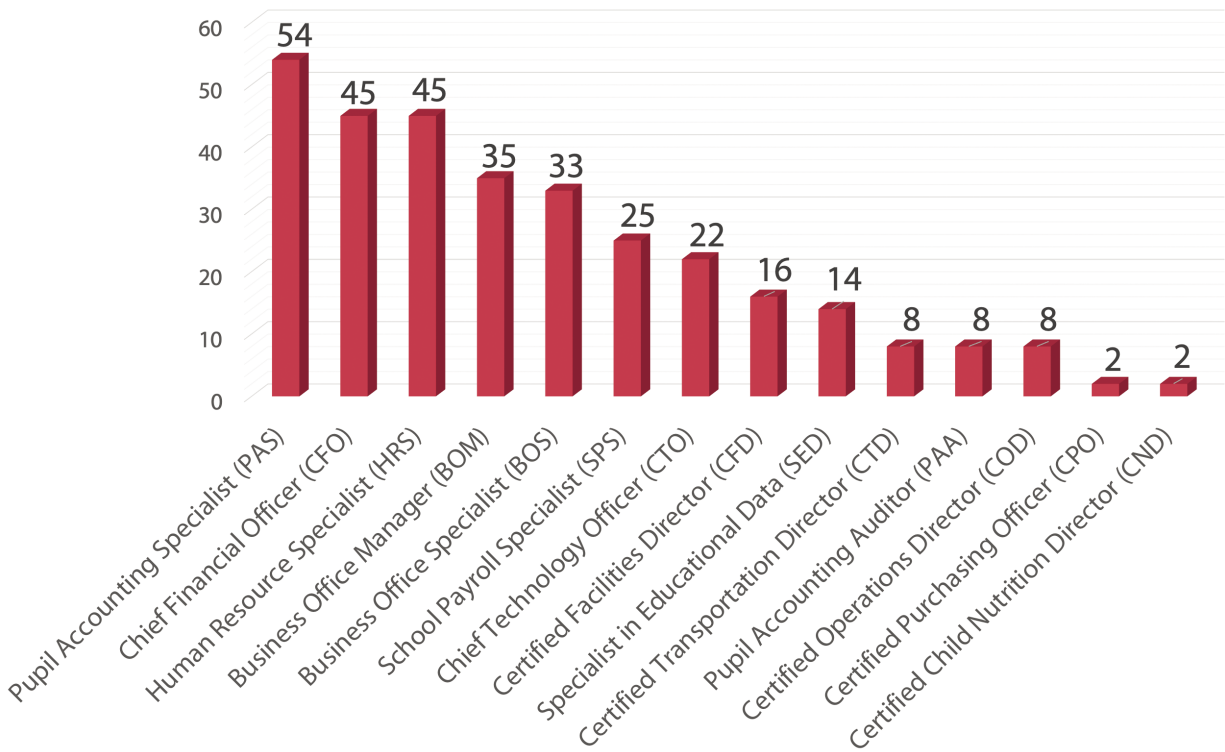
MSBO certification is a voluntary system providing focused training to school business officials offering practical information that will help school business officials succeed and excel in their employment.

The program is endorsed by the Michigan Association of School Boards (MASB) as well as the Michigan Association of

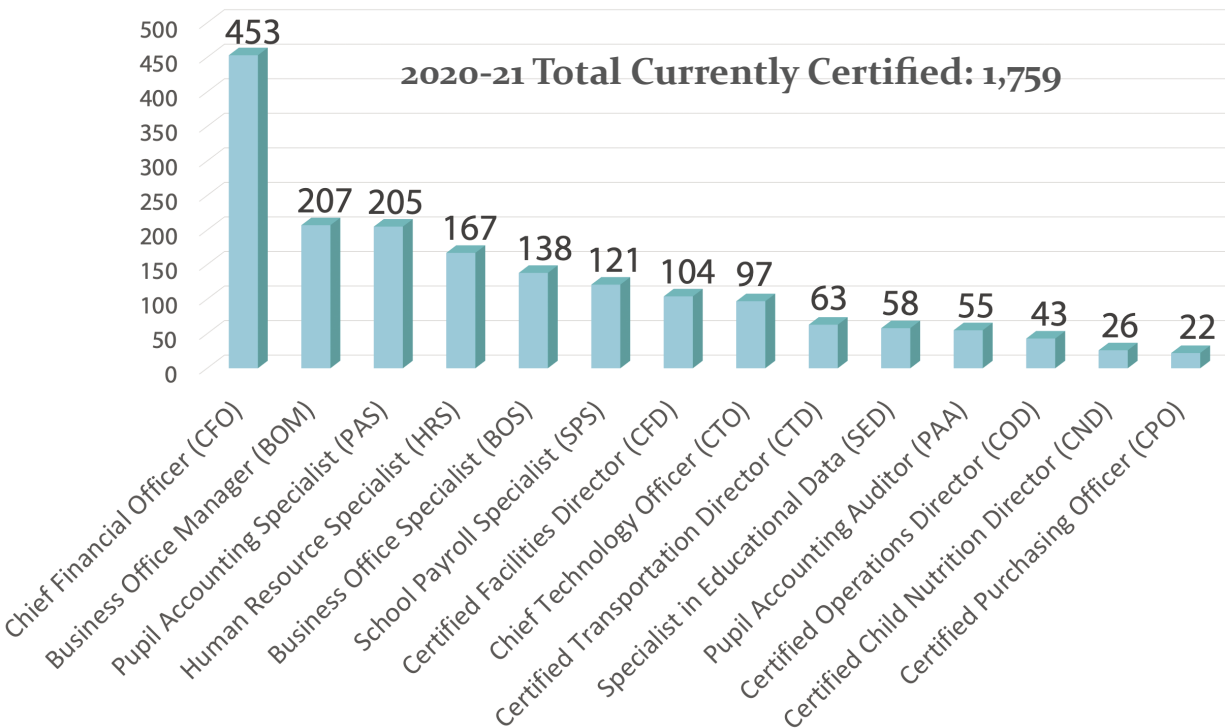
Superintendents and Administrators (MASA). MSBO offers 14 separate certification tracks.

Since 1998, more than 3,200 members have earned an MSBO Voluntary Certification Award.

Awarded 2020-21 = 317



2020-21 Total Currently Certified: 1,759



MSBO Award Recipients

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

Distinguished Service Award

MSBO's Distinguished Service Award was established in 1987 to pay special tribute to exemplary current or former members of MSBO. It is given to those who provide inspirational service to MSBO and the school business management community.

- **Lori Adkins, Oakland Schools**

School Business Official of the Year

This award honors an individual whose recent accomplishments and contributions in school business have occurred during the past two years.

- **Scott Sawyer, Saginaw ISD**

Meridian Award of Excellence

The Meridian Award of Excellence is a special recognition award acknowledging successful practices in all areas of school management and education.

Winners:

- **Jon Barth, Berkley School District**
- **David Mustonen, Dearborn Public Schools**

Friend of Education

This special award honors individuals who are not members of MSBO and yet, have been dedicated to serving the best interests of education and students.

- **Louis Burgess, Michigan Department of Education (Retired)**

President's Award

Most MSBO awards are chosen by a review committee or the MSBO Board of Directors. The President's Award is chosen by the president. MSBO Board President Bill Chatfield awarded the President's Award to:

- **Scott Little, MSBO**

Mark and Kay Stebbins Scholarship

The Mark and Kay Stebbins Scholarship (\$2,000) is targeted to members who are improving their technical skills and competencies by furthering their education.

- **Breann Eckerle, Eastern Upper Peninsula ISD**
- **Emili Jones, Northwest Community Schools**
- **Alexis Regnier, Mason Public Schools**

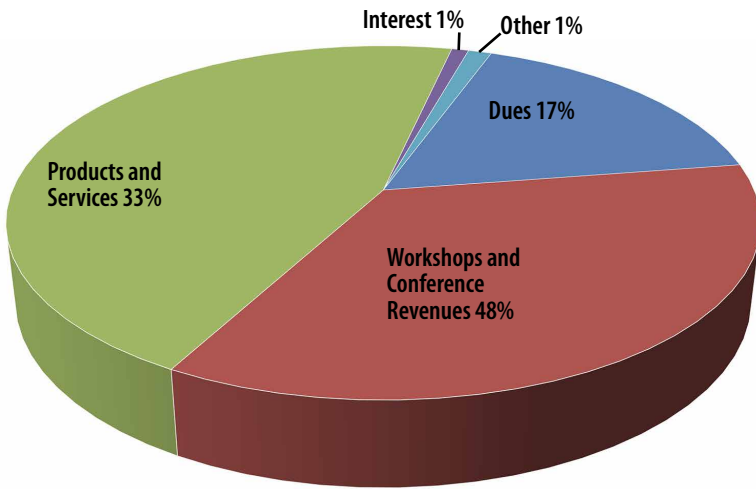
Wally Piper Scholarship

The Wally Piper Scholarship (\$3,000) recognizes members pursuing a graduate degree.

- **Eric Galer, Eastern Upper Peninsula ISD**
- **Candice Halifax, Huron ISD**
- **Kristin Melvin, Newaygo Public Schools**
- **Regina Warner, Pittsford Area Schools**

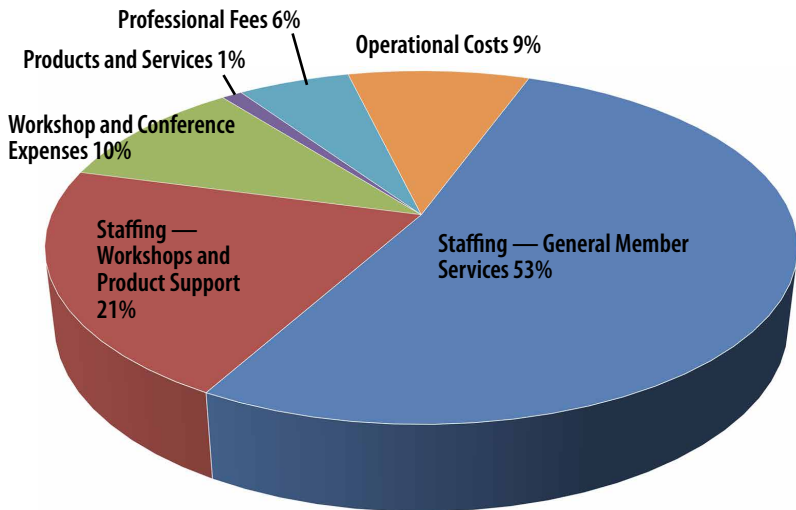
Financial Review

Revenues by Category*



Dues	\$485,850
Workshops and Conference Revenues	1,362,760
Products and Services.....	946,977
Interest.....	24,631
Other.....	33,889
Total	\$2,854,107

Expenses by Category*



Staffing — General Member Services.....	\$1,262,789
Staffing — Workshops and Product Support.....	506,872
Workshop and Conference Expenses	246,466
Products and Services.....	25,289
Professional Fees.....	138,212
Operational Costs	223,797
Total	\$2,403,425

Balance Sheet

Assets:

Current Assets	\$5,943,398
Non-Current Investments.....	199,047
Furniture and Equipment.....	60,031
Investment in MELG	714,403

Total Assets **\$6,916,879**

Liabilities and Net Assets:

Current Liabilities	\$594,109
Non-Current Debt	148,931
Deferred Compensation Plan Liability ..	199,047

Net Assets:

Designated	1,339,347
Other	4,635,445

Total Liabilities and Net Assets ... **\$6,916,879**

The Financial Review Committee met on Monday, November 1, 2021.

The Committee is comprised of:

- Robert Spagnuolo, DeWitt Public Schools (Chair)
- Chris Frank, Bay-Arenac ISD
- Abby Lloyd, Allegan Area ESA

MSBO President-Elect Julie Omer (Board liaison), MSBO Executive Director David Martell, MSBO Deputy Executive Director Robert Dwan, MSBO Accountants Patty Lenneman and Chris Twitchell, and Paul Bryant from Plante Moran, PLLC 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.

**Revenues and Expenditures continue to adjust to pandemic operations. Many events were converted to virtual.*

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 6,000 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 their career.

Dude Solutions



Dude Solutions is the nation's number one provider of on-demand operations management solutions designed 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. Dude Solution's tools are easy to use and affordable; helping schools save money, increase efficiency, and improve services. MSBO's relationship provides discounts for Michigan school districts.

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.

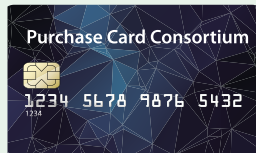
Michigan Liquid Asset Fund Plus (MILAF+)



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 413 school districts and other public entities participate in this program.

Business Solutions & Partnerships

Michigan Purchasing Card Consortium



The Consortium, similar to a credit card program, 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 15th year was another great success for the program with districts earning approximately \$481,000 in rebates for the calendar year 2020.

Michigan Schools Energy Cooperative (MISEC)



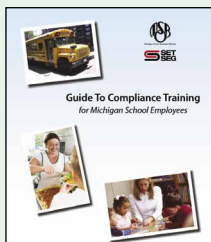
Michigan Schools Energy Cooperative (MISEC) was established in 1997 by MSBO, MASA, Michigan Association of Intermediate School Administrators (MAISA), Middle Cities Education Association (MCEA), and MASB as a joint venture to allow schools to take full advantage of cost-saving opportunities provided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

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.

OMNIA Partners



OMNIA Partners is the largest and most trusted cooperative purchasing organization for public sector procurement. The nation's two leading cooperative purchasing organizations – National IPA and U.S. Communities – joined under one roof to form OMNIA Partners, Public Sector. The collective buying power of these unified purchasing cooperatives delivers superior value and savings for public agencies nationwide.

Business Solutions & Partnerships

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 national, even international audiences for buses, equipment, and anything else school districts may wish to sell.

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.

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.

Wilkes University



Provides bachelors and masters level school finance degrees in an online virtual format. Located in Pennsylvania, Wilkes University has partnered with several other state ASBO affiliates to provide access to school finance specific content and degrees.



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.

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