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22

Annual  
Report



Michigan School Business Officials

# 2021-22 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**  
**Deanna Mayer, CPA, CFO**  
Director of Finance and  
Human Resources  
Eastern Upper Peninsula ISD



**President-Elect**  
**Julie Omer, MBA, CPA, CFO**  
Chief Financial Officer  
Owosso Public Schools



**Immediate Past  
President**  
**William Chatfield, CFD**  
Director of Operations  
Walled Lake Consolidated  
Schools



**Executive Director**  
**David Martell, CPA, CFO**  
Executive Director  
MSBO

## Directors



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



**Tim Peraino, CFD**  
Director of Facilities  
Kent ISD



**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, M.Ed, CPA, CFO**  
Finance Director  
Huron ISD



**Associate Member  
Representative**  
**Ed Stasiak**  
President  
KSS Enterprises

# Membership & Member Involvement

## 2021-22 Regional Presidents

<b>Allegan County</b> Samantha L. Ball, BOM, CFO Martin Public Schools	<b>Lakeshore</b> Tracey French, CFO Reeths-Puffer Public Schools	<b>Northwest Michigan</b> Nadia L. Hoover, CFO Northwest Education Services	<b>Thumb Region</b> Kendra Messing, BOM Sandusky Community Schools	<b>Western Area</b> Christine A. Marcy Jenison Public Schools
<b>Berrien/Cass/Van Buren</b> Pano Arvanitis, BOM New Buffalo Area Schools	<b>Macomb/St. Clair County</b> Piero A. Basile, CPA, CFO Lake Shore Public Schools	<b>Oakland County</b> Katherine F. Abela, CFO Royal Oak Public Schools	<b>Upper Peninsula</b> Anthony Bertucci Marquette-Alger RESA	
<b>Central Michigan</b> Adrienne Barna, CFO Ionia Public Schools	<b>Middle Michigan</b> Kevin J. Kolb, CFO Gratiot-Isabella RESD	<b>Saginaw Valley</b> Anna Wamack, CFO, HRS Hemlock Public Schools	<b>Washtenaw/Livingston</b> Denise Kerrigan, CFO Whitmore Lake Public Schools	
<b>Genesee Area</b> Daniel B. Romzek, CPA, CFO Genesee ISD	<b>Monroe/Lenawee</b> Joshua P. Dyer, CPA Monroe County ISD	<b>South Central</b> Lori Mayo, BOM Michigan Center Schools	<b>Wayne County</b> Penny Morgan, CFO Crestwood School District	
<b>Grand Valley</b> Marty Eischer, CFO Comstock Park Public Schools	<b>Northern Michigan</b> Melissa Cook, PAA, CFO Alpena-Montmorency-Alcona ESD	<b>Southwestern</b> Blair D. Brindley, CFO Three Rivers Community Schools	<b>Western Area</b> Christopher D. Lamer, CFO Ottawa Area ISD	

## 2021-22 Committee Chairs

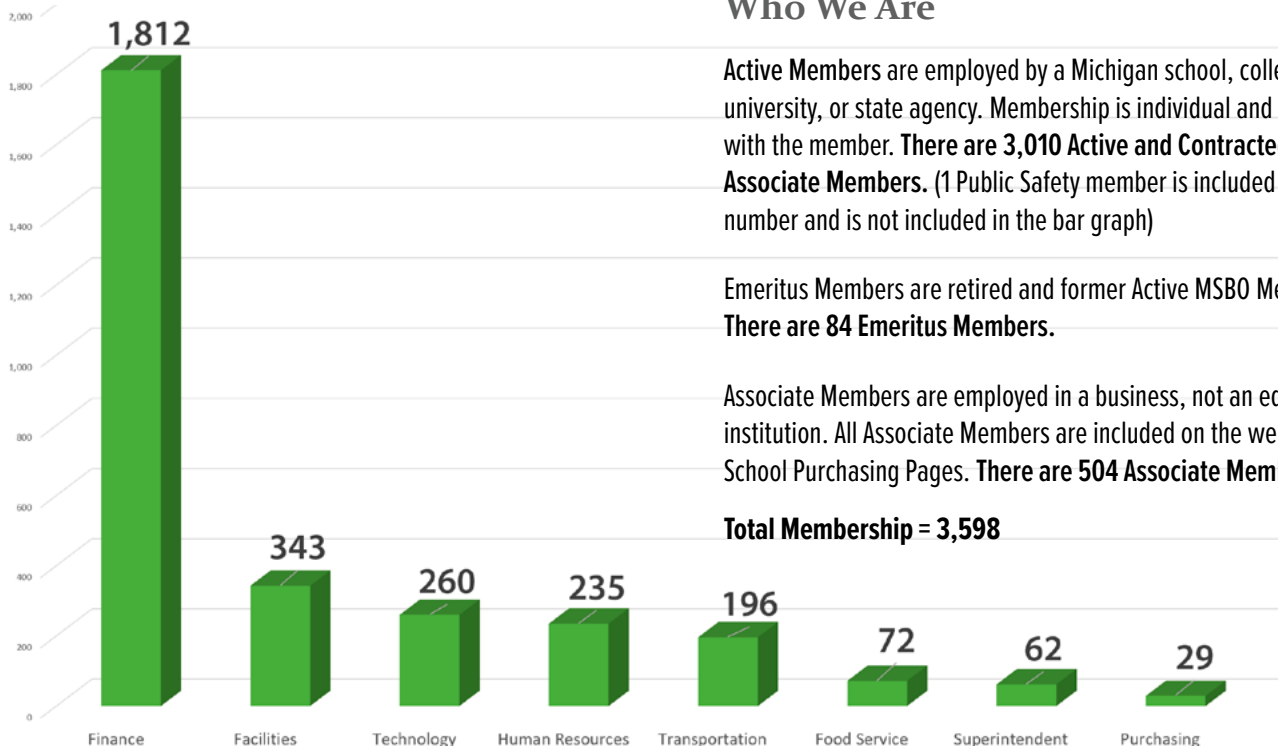
### Program & Research

<b>Facilities Management</b> Shawn Hayward Rockford Public Schools	<b>Professional Development</b> Neil R. Cassabon, CFO Warren Woods Public Schools	<b>Technology (Co-Chair)</b> Fred Sharpsteen, CTO Mecosta-Osceola ISD
<b>Food &amp; Nutrition Service</b> Daniel Connors, CND Detroit Public Schools Community District	<b>School Finance Services</b> Stacey Viers, CFO, CPA, SFO Huron ISD	<b>Transportation</b> Cynthia Valentine, CTD Novi Community Schools
<b>Intermediate School District</b> Kevin J. Kolb, CFO Gratiot-Isabella RESD	<b>Technology (Co-Chair)</b> Richard Webb, CTO Fremont Public Schools	

### Administrative

<b>Bylaws and Resolutions</b> Jason R. Helsen, SFO, CFO Reeths-Puffer Public Schools	<b>Membership</b> Steven A. Lenar, CFO Holly Area Schools
<b>Elections</b> Sharon Raschke, CFO Dexter Community Schools	<b>Nominations</b> William Chatfield, CFD Walled Lake Consolidated Schools
<b>Financial Review</b> 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 3,010 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 84 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 504 Associate Members.**

**Total Membership = 3,598**

# Program Highlights



Michigan School Business Officials

## 83rd Annual Conference & Exhibit Show



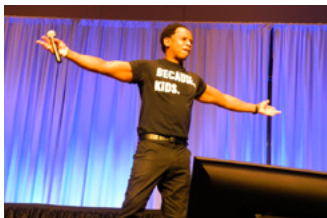
April 26-28, 2022

The 2022 MSBO Annual Conference & Exhibit Show was held in Grand Rapids at the Amway Grand Plaza and DeVos Place. The Conference is the most comprehensive and cost-effective professional development opportunity for school business officials in Michigan.



### Opening Session: David J. Hulings, Executive Leadership & Transition Coach

David Hulings opened the conference with a thought provoking session on Preparing for the Future Post-Pandemic Educational World. His talk focused on moving forward in a post-pandemic world, and more importantly, learning how to prepare our school districts for this new post-pandemic educational world.



### Keynote Presentation: Dr. Adolph Brown, III

Dr. Adolph Brown, III has more than 30 years of experience working with issues of mental wellness, social justice, equity, education and diversity. He discussed self-learning and healing and how changing the world within us can change the world around us.

**1,506**

Registrants

**354**

Exhibitors

**186**

Topics

**314**

Presenters



### Virtual Town Hall and Committee Meetings

MSBO has continued to bring members together through “Town Hall” and virtual committee meetings. The ability of members to connect with peers and address issues they were facing in their districts is immeasurable.



### Financial Market Updates

PFM Asset Management LCC, provides bi-weekly financial markets updates focusing on the market and managing school budgets in an uncertain economy.

# Program Highlights

## **Business Manager/CPA Workshop:**

Provides timely information for practicing CPAs and business managers.

**254**

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.

**171**

Participants

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

**361**

Participants

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

**24**

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.

**398**

Participants

## **Annual Facilities/Operations Director Conference & Expo (Virtual):**

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.

**264**

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.

**37**

Participants in Three Cohorts

# 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.



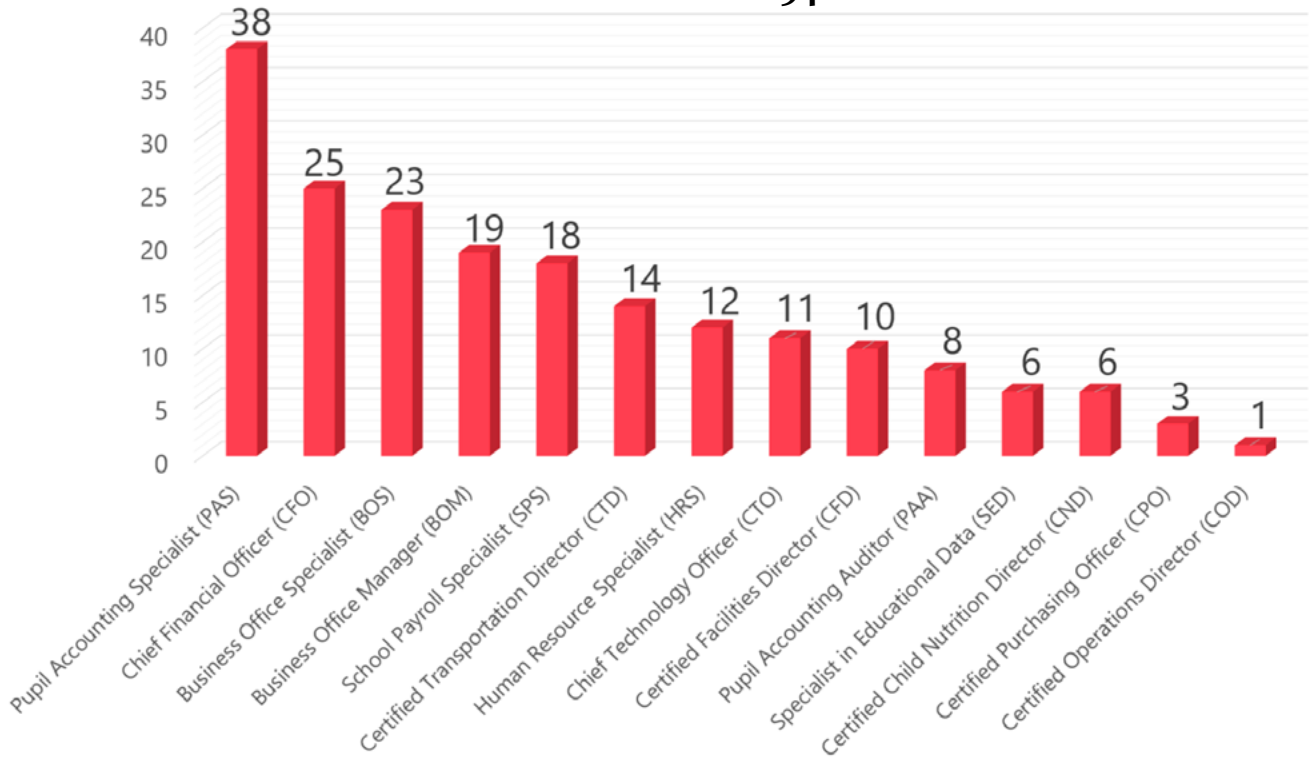
# MSBO Voluntary Certification

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.

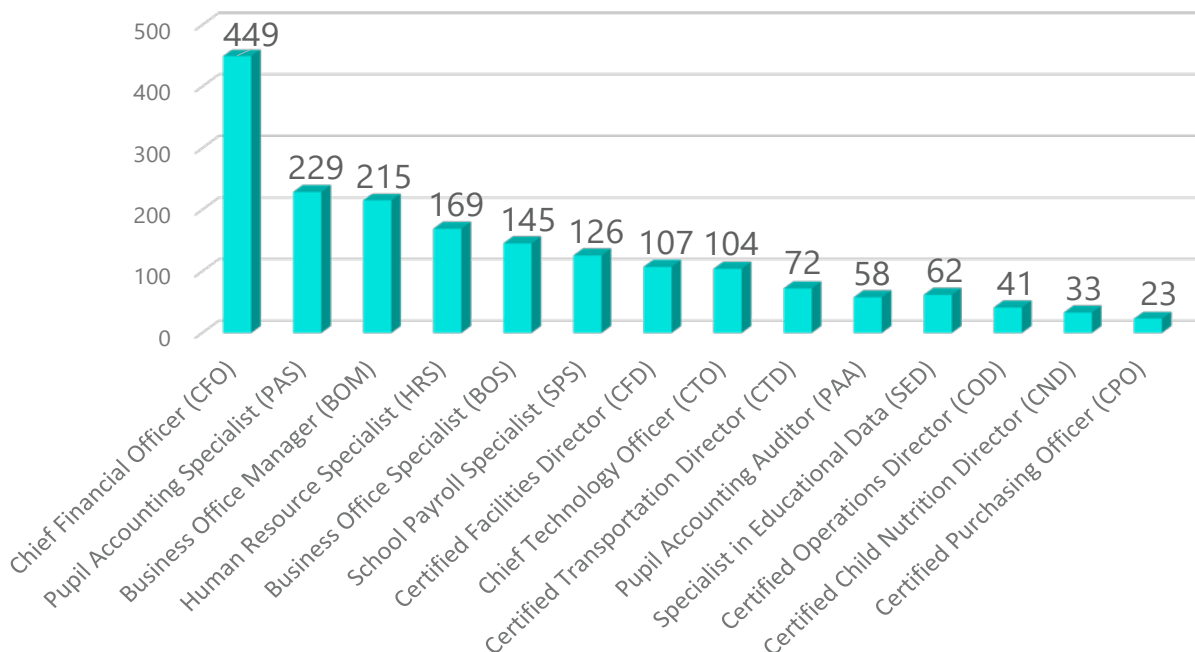
The program is endorsed by the Michigan Association of School Boards (MASB) as well as the Michigan Association of Superintendents and Administrators (MASA). MSBO offers 14 separate certification tracks.

Since 1998, 3,278 members have earned an MSBO Voluntary Certification Award.

## Awarded 2021-22 = 194



## 2021-22 Total Currently Certified: 1,833



# 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.*

**Winner:**

**Steven G. Ezikian, Wayne RESA**

## 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.*

**Winner:**

**Michelle Sine, Charlotte Public Schools**

## 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.*

**Winner:**

**Wayne-Westland Community Schools, Maintenance & Operations Department**

## 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.*

**Winners:**

**Christopher May, MDE**

**Kevin Walters, MDE**

## 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 Dena Mayer awarded the President's Award to:*

**Winner:**

**Shelley J. Promo, EUPISD-Ojibwe Charter Schools**

## 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.*

**Winner:**

**Livia Christman, Allegan ESA**

## Wally Piper Scholarship

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

**Winner:**

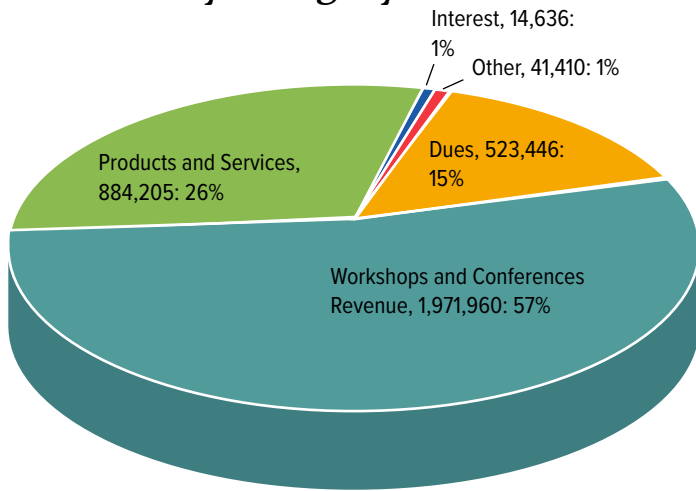
**Tracy Clawson, Allegan Public School**

## Investing in MSBO Members Scholarship Program

The MSBO Board approved the creation of the Investing in MSBO Members Scholarship Program. The purpose of these scholarships is to provide opportunities for professional development to MSBO members currently employed in school business to improve their skills and competencies in school business management. In 2021-22, 23 recipients received scholarships to attend the MSBO Leadership Institute, the MSBO Introduction to School Business Conference, the Business Manager Academy, and four Certification track scholarships.

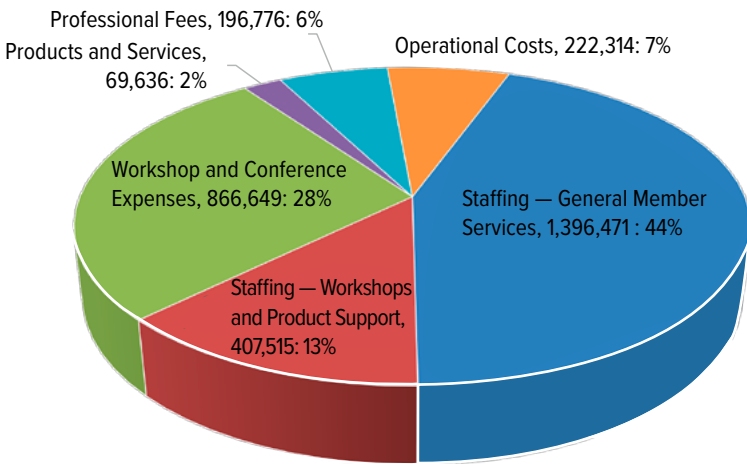
# Financial Review

## Revenues by Category



Dues .....	\$523,446
Workshops and Conferences Revenue .....	1,971,960
Products and Services .....	884,205
Interest .....	14,636
Other .....	41,410
<b>Total .....</b>	<b>\$3,435,657</b>

## Expenses by Category



Staffing — General Member Services .....	\$1,396,471
Staffing — Workshops and Product Support .....	407,515
Workshop and Conference Expenses .....	866,649
Products and Services .....	69,636
Professional Fees .....	196,776
Operational Costs .....	222,314
<b>Total .....</b>	<b>\$3,159,361</b>

## Balance Sheet

### Assets:

Current Assets .....	\$6,021,936
Non-Current Investments .....	187,383
Furniture and Equipment .....	49,315
Investment in MELG .....	687,507

**Total Assets .....** **\$6,946,141**

### Liabilities and Net Assets:

Current Liabilities .....	\$507,670
Deferred Compensation Plan Liability .....	187,383

### Net Assets:

Designated .....	1,312,743
Other .....	4,938,345

**Total Liabilities and Net Assets \$6,946,141**

The Financial Review Committee met on Thursday, October 27, 2022.

The Committee is comprised of:

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

MSBO President-Elect Mary Beth Rogers (Board liaison), MSBO Executive Director David Martell, MSBO Deputy Executive Director Robert Dwan, MSBO Accountant 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.



# 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 6,500 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.



## 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 464 school districts and other public entities participate in this program.



## 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.



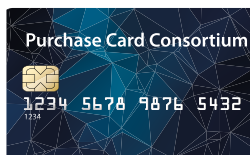
## Brightly

Brightly (formerly 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.



## 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 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 16th year was another great success for the program with districts earning approximately \$600,659 in rebates for the calendar year 2021.



## 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.

# Business Solutions & Partnerships



## 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.

## 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.

## 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.

## 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/ Vector Solutions

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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