

ALASBO News Link...



November 2016

A newsletter publication of Alaska Association of School Business Officials

ALASBO News Link
is published for the members of the Alaska
Association of School Business Officials
and its affiliate members.

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*Would you like to receive this newsletter in print,
rather than e-mail? Send a message to Amy Lujan at
the above address.*

President's Message

Mark Vink, Bering Strait School District

It doesn't seem possible that the ALASBO Annual Conference is less than a month away, December 4-7 in Anchorage. Don't miss the opportunity to take in the professional development that is planned. This is one of the few times where you will have the opportunity to network with colleagues to discuss ways for you to do your job better. It's easier to talk with someone who has solutions to issues that you are dealing with than to be frustrated and spend hours by yourself trying to find a solution.



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This past September, I had the opportunity to attend the ASBO conference in Phoenix. This is an annual event that brings school officials from across the country and around the world together for a week of professional development. The topics presented were directly relevant to the tasks that we are asked to do on a daily basis. It was interesting to talk with others from around the country and beyond about the issues they face and how they found solutions.



Many of the states have faced the budget issues that we are currently facing. Listening to the steps they have taken for their districts provides helpful guidance for what Alaska is experiencing.

I look for this next legislative session to have education funding in the forefront. We will be “Stepping up to the Challenge” to help provide for our students. We will have to step up in many ways, from helping our own districts to spend wisely, to assisting at the state level with providing information for the decision makers and working with legislators.

This year has gone by very fast and I would like to thank all of you members, the Board, and Executive Director Amy Lujan for this past year. I have enjoyed the experience and hope that in the future, we have more people “Step Up” for ALASBO, to continue to make our organization one of the premier organizations for education in the state. Having attended various national conferences over these past two years, I would rate ALASBO as one of the top state business official associations in the county. This only comes from hard work in past years to build our association to what is today. I hope to see you in December.



Plan to attend the Legislative Fly-In:

April 9-11, 2017 in Juneau

Executive Director's Message

Amy Lujan, Executive Director



I'm so excited about this year's annual conference, December 4-7 in Anchorage, “Stepping up to the Challenge”! Once again, we have a power-packed program, with sessions providing the information you need to help you meet the challenges of your work in school business. Now more than ever, you need to find the best resources to manage the demands of your workload! You may even need to bring a few extra colleagues to cover all the sessions we have planned.

It's not too late to register, or to add or change your preconference selections. This year's preconference on Sunday, December 4 includes:

- School Business Academy – full day
- Payroll – morning
- Excel Pivot Tables – morning
- Human Resources and Employee Management – morning
- Exploring Cost Management Strategies in an ACA World (health reform) – afternoon
- Educator Qualifications and ESSA – afternoon
- P-Card/Spend Dynamics – afternoon

We also have three fantastic general sessions lined up:

- John Sedor – Monday
- Mike McKinley – Tuesday
- State Fiscal Challenges – Wednesday

On the lighter side, we'll have great networking events, including casino and karaoke night again this year! The full conference program is now available on the registration site.

Please don't hesitate to contact me if you need help registering or have questions.

The registration website is:

<https://www.regonline.com/alasbo2016annualconference>

Along with Mark, I thoroughly enjoyed the **ASBO International conference**, along with 24 other ALASBO members. You'll

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see several articles in this newsletter and in future editions about the great sessions we attended.

I hope to see you all soon! If you have questions about any ALASBO program, please do not hesitate to contact me at alasbo@gci.net, or 907-723-7415. You'll also find useful information at: www.alasbo.org.

Top 10 Reasons to Attend ALASBO Annual Conference



10. Will John Sedor wear a costume this year? Will we get some good belly laughs in while we talk about wrenching (and normally boring) legal issues?

9. Meet the people you'll be calling on the phone and emailing face-to-face...and they'll get back to you more quickly!

8. Do you regret not singing karaoke last year? You'll have another chance, while the chips are down (casino night too!)

7. Quiz Kevin Worley from DRB on the latest plan to *speed up* the GASB68 number crunching required for year-end financial statements.

6. Get an injection of motivation on facing challenges from keynote speaker Mike McKinley.

5. Check out SchoolDude Josh Peach's latest crazy holiday outfit!

4. Learn the latest tools and tricks: ACA, Speed Dynamics, Pivot Tables, e-Reporting, etc.



3. Provide input on approaching this year's legislative session to our ACSA colleagues and State OMB Director Pat Pitney.

2. Holiday shopping in Anchorage? Yes, really!

1. THE BEST, MOST TARGETED PROFESSIONAL DEVELOPMENT FOR ALASKAN SCHOOL BUSINESS OFFICIALS AVAILABLE ANYWHERE!

Register now and encourage all your colleagues to attend – it's going to be a great conference!

<https://www.regonline.com/alasbo2016annualconference>

First Ever: ALASBO Ugly Holiday Sweater Contest!



Wear that lovely sweater or vest to the **Tuesday conference banquet** for a chance to win a fabulous prize!

Tune Up Your 403(b) and 457 Plans

Carl Horn, Nenana School District

During the Association of School Business Officials International (ASBO) Annual Meeting and Expo this past September in Phoenix, I attended an update on emerging issues and the ongoing audit program of the Internal Revenue Service of elective deferral plans (403(b) and 457.) The last major change to the regulation for these plans took effect in 2009. Seven years into the changes if you have not looked at your plan and plan documents, you should. Dust off those plan files and take a look.

Here is a brief take away of important issues from real world audit and practice presented at the meeting:



- Be sure you are not over withhold--deferring employee income. An example is someone making a large end of the year withholding

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to make that year's limit, then the setting is not changed in your payroll software for future years resulting in inadvertent excess contributions.

- Check that your plan has been formally approved by your governing board and the actual plan signed and executed by district officials.
- Amend your plan and notices to employees with the correct annual deferral limits, which change from year to year. 
- When amending your plan, consider eliminated the option for the 15 years of service catch-up, which is little used, complex and prone to election errors.
- Be sure you provide employees with regular notice of availability. Offer new employees the option to elect deferral of their salary into the plan. These plans are for the most part required to be available to all employees, including your temporaries and substitutes. They likely will not elect, but the important take away is they need to be offered.

The 403(b) and 457 elective deferral plans offer useful tools for school district employees to make tax efficient savings for retirement. It's important to keep our plans up to date and avoid those penalties the IRS is currently assessing districts which are found to not be complying with the laws and regulations.

DEED Performance Review and Planning

Amy Lujan, ALASBO Executive Director

ALASBO members may recall the opportunity to provide input to state staff and contractors working on a performance review of the Alaska Department of Education and Early Development during last year's annual conference. The report resulting from this lengthy process is now available here: <http://legaudit.akleg.gov>. Click on Performance Reviews near the top of the page.

The Division of Legislative Audit is tasked with these reviews, but due to budget cuts this may be the last audit of DEED for many years. The report is long – nearly 400 pages – so it'll probably take the awhile to implement all these recommendations anyway!

The auditors did an impressive job reaching out to DEED stakeholders. ALASBO input is referenced numerous times in the report, especially during the section on recommendations regarding the Chart of Accounts, beginning on page 348.

One would hope that as our government is being "streamlined" due to the state fiscal challenges, the input to this report and the recommendations will be used to make sure that essential services provided by DEED are retained and even improved.

In addition, the State Board of Education is currently in the process of strategic planning, which will continue through June, 2017. Find out more at:

https://education.alaska.gov/State_Board/



ASBO International Recognition

Congratulations to the following districts that have been recognized by ASBO International for their financial documents!

Certifications of Excellence in Financial Reporting – FY15 Statements

- Anchorage School District **
 - Bering Strait School District **
 - Fairbanks North Star Borough School District
 - Kenai Peninsula Borough School District **
 - Matanuska-Susitna Borough School District
- ** Denotes 25 years or more

Meritorious Budget Award – FY16 Budget

- Juneau School District
- Kenai Peninsula Borough School District
- Matanuska-Susitna Borough School District

Learn more about the criteria for these ASBO programs at: <http://asbointl.org/>.

ASBO Conference Experience

Tammy Grove, North Slope Borough School District



This year's ASBO conference in Phoenix was sunny, warm, and amazing! The conference truly offered a wide variety of sessions to accommodate all interests.

The keynote speaker on the first day was artist Phil Hansen. His story was about overcoming a tremor he developed, and how it affected him as an artist. Not only did he share his message of "embracing the shake", he took the opportunity to create an awesome piece of artwork with the audience's help. I have never claimed to be an artist, and I apologized to Liz Hayes of Kenai when we were instructed to draw the person sitting next to us (among other things) on a 1-inch square piece of paper.

Phil spoke of embracing our limitations as opportunities. We might not do things the way we used to, but there is certainly more than one way of going about accomplishing a task. And sometimes, it's even better than what we're used to or what we've ever imagined. The result of all the 1-inch "art" pieces?



Look closely and you can see several thousand 1-inch masterpieces, created by the ASBO audience. Phil and his team spent many hours overnight putting this together.

In addition, I found the GASB update session to be informative and – yes, really – humorous!

The session consisted of a timeline and narrative of past GASB pronouncements as well as future exposure drafts. Who knew a GASB board member dressed in a bowtie could have a great and entertaining personality? It really makes a difference when learning is fun!



Another session I benefited from was the Ins and Outs of Government Fund Financial Statements. It seamlessly tied in with the governmental accounting class I'm taking this semester. Afterwards, I declared to my supervisor that I was going to write our district's financial statements next year. I think I was a bit overly ambitious when I made that statement!

The biggest take-away from the ASBO conference was the time spent with my fellow Alaskans. I'm early in my accounting career and am not on the same professional playing field with many of you. I honestly appreciate the friendship and willingness to help me navigate the world of school finance.

I'd like to thank CORE, Inc. for sponsorship of the Lowell Thomas Freeman Grant. I'd also like to thank ALASBO and the scholarship committee for viewing me as a worthy candidate. It was an honor to represent ALASBO and the great state of Alaska.

*We've finished our **Power Lunches** for 2016. **Thanks to our great presenters!!***

You can still access materials and recordings of sessions on our power lunch website page.

In 2017, these items will be moved to our Resources-Information Library page, at least until newer materials on specific topics become available.

ALASBO



Member Spotlight

Alicia Campbell, Mat-Su Borough School District

Tell us about your school district

Matanuska Susitna Borough School District prepares all students for success. MSBSD is the second largest school district in Alaska, with more than 18,000 enrolled at 47 school sites this school year.

How long have you been in school business?

I've been with MSBSD for 10 years.

How did you get into this business?

I started in school business working in a school that my children attended. I loved going to school with them and being a part of their school environment. When my children grew older, I moved into the finance side of school business.

What do you like best about your job?

I enjoy the challenges of school business. I work in a positive environment with people who want to be part of making a positive impact on the Mat-Su community. I also enjoy implementing new ideas that improve efficiencies within Business Services

What advice do you have for those new to school business?

Stay positive and continue to improve your skills and knowledge in school business. Gather information, fact find, and reach out to your resources as often as you can. The more knowledge you have, the better you will be at your job.

How have you benefited from membership in ALASBO?

ALASBO has been a great resource for gaining knowledge related to school business. The networking opportunities have also benefited me greatly.

What do you like to do for fun?

I love to hike in Mat-Su Valley in the summer. In the winter I enjoy skiing and spending time with family during the holidays.

If you could visit any place in the world, where would you go and why?

The answer to this question changes all the time because I want see everything that I possibly can. Today, my answer is Spain.

Tell us something about yourself that most people don't know?

Those who don't work with me every day might not know that I'm a grandma as of this past year. I also have another son graduating from Palmer High this year. How time flies!

What is your proudest accomplishment?

Professionally, it has been to lead an Accounting Team that does a great job of representing the school district. Our ability to consistently produce high quality work and to maintain a positive work environment is an accomplishment that I'm proud of.

Send us your pictures – anytime you're traveling around the district, take a photo for the ALASBO annual meeting slideshow!

Send them to:
yodean.armour@klawockschool.com

Keep Up with Education Policy Changes

With a new federal education administration on the horizon, you'll need to keep up with education policy changes in 2017! Fortunately, ASBO International has been strengthening its legislative arm in recent years.

Recently, ASBO published a Federal Legislative Priorities document that is available on the ALASBO site, on the Resources-Legislative Activity page. For more information like this in the future, join the ASBO Global School Business Network (GSBN) Legislative Community! If you've lost track of your GSBN login, contact Theresa: tboulware@asbointl.org.

In addition, Ed Connector will provide both federal and Alaskan resources. For help with signing in, posting a question or adjusting your notifications, contact Lora Jorgensen: lora@edconnector.org. Lora will also be at the ALASBO annual conference to provide information and assistance.

Both the GSBN and Ed Connector are a great way to reach out to your colleagues for resources. Don't try to re-invent the wheel!

Final IRS ACA Forms and Instructions for 2016

Scott Florsheim, American Fidelity

The IRS recently released the final forms and instructions large employers will use to meet their 2016 Employer Mandate reporting obligations under the Patient Protection and Affordable Care Act (ACA). Employers may now view final versions of the following:

- **Form 1095-C:** Individual employee statement used to report details of the health coverage offered to each employee who qualified as full-time under the ACA during 2016 and, for self-funded coverage, to report 2016 enrollment information for all participants covered under a self-funded plan.
- **Form 1094-C:** Transmittal form used to report aggregated employer-level information on a month-by-month basis, including full-time employee count and whether the employer offered coverage during 2016 to "substantially all" full-time employees as defined by the ACA.
- **Enrollment by Non-Full-Time Employees in Self-Funded Coverage:** Code 1G is used to report enrollment of individuals other than full-time employees in a self-funded health plan. The final instructions clarify that code 1G must either appear in the "All 12 months box" or in every monthly box.
- **Affordability Safe Harbors:** The final instructions warn employers not to enter an affordability safe harbor (codes 2F, 2G and 2H) on line 16 of Form 1095-C for any month in which the employer did not offer minimum essential coverage to at least 95% of its full-time employees and their dependents (that is, any month for which the "No" box is checked on Form 1094-C, Part III, column (a)).
- **Post-Employment Coverage:** The instructions clarify that coverage offered after termination of employment (including COBRA and retiree coverage) should not be entered as an offer of coverage on line 14 of the 1095-C. However, an offer of COBRA coverage to an employee who remains employed should be coded as an offer of coverage using the appropriate line 14 code on the 1095-C.



The IRS also released final instructions for use in completing the 2016 forms. While the final instructions are substantially similar to the draft version released earlier this year, employers should take note of the following changes:

- **Requests for a Waiver of the Electronic Filing Requirement:** To request a waiver of the electronic filing requirement for filers of 250 or more Forms 1095-C, an employer must submit Form 8508 to the IRS at least 45 days before the due date of the return. Waiver requests will not be processed until January 1, 2017.
- **Increased 2016 Penalty Amounts:** Each failure to distribute a Form 1095-C employee statement to employees and/or to file a copy of each statement with the IRS using Form 1094-C is subject to a penalty of \$260/violation, up to a cap of \$3,193,000.
- **New Conditional Offer Codes for Form 1095-C:** New codes 1J and 1K may be entered on line 14 of the 1095-C to more accurately describe conditional offers of coverage to an employee's spouse.

Individual statements (Form 1095-C) must be distributed to employees no later than January 31, 2017, and a copy of each Form 1095-C must be filed with the IRS along with the employer's Form 1094-C transmittal no later than February 28, 2017 if on paper (permitted for employers filing fewer than 250 returns) or March 31, 2017 if filing electronically (required if filing 250 or more returns). (NOTE: 1/31/17 deadline extended to 3/2/17 with IRS announcement on 11/18/16.)



For more information about this and other regulatory developments, visit our website at HCReducation.com. Or, contact your local American Fidelity account manager with any questions you may have.

Don't miss the ACA Preconference session by American Fidelity's Scott Florsheim and Kent Borgman:

Sunday afternoon, December 4

To add this session to your registration, sign back into the registration site or contact Amy Lujan, alasbo@gci.net

ALASBO 2016 Liaison and Mentor Assignments

Liaison/Mentor match-up's are a two-way street; contact your match today!

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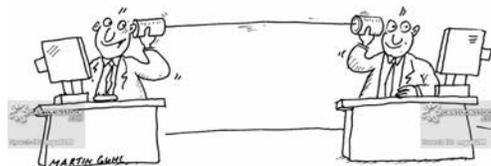
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Upcoming Events

*December 4-7, 2016 – ALASBO
Annual Conference, Anchorage*

*February 16-18, 2017 – ASBO
Executive Leadership Forum, Miami,
FL*

*April 9-11, 2017 – Legislative Fly-In,
Juneau*

AGFOA Presentation

Amy Lujan, ALASBO Executive Director

I was invited to present to the Alaska Government Finance Officers Association (AGFOA) at their annual conference in November. As far as I know, this is the first time ever that ALASBO has been asked to present! I was told that city and borough financial officials were interested in learning more about school finance issues. After consultation with ALASBO President Mark Vink, I decided this was an opportunity not to be missed!

My presentation is available on our website, under Resources-Info Library-Other Downloads. I posted it in Powerpoint, in case anyone wants to copy parts of it into other stakeholder presentations.

In preparing for this presentation, I reached out to ALASBO Board members and others who've had significant experience dealing with city and borough officials. What should I emphasize?

I started the presentation with some history about education in Alaska, since these historical themes shape how we view current issues. I also talked about the diversity of districts in Alaska, with regard to structure (REAA, city, borough), size and student diversity.

Next, I talked about the nature of our work as school business officials. So often people assume they understand what we do, but they don't realize important elements such as the diversity of funding systems and the extent to which districts are personnel-heavy.

In the next section, I talked about the life of a school business official in more depth, and I spent some time on the foundation formula, since the formula is central to our funding. I wanted to emphasize that the formula is actually a delicate balance, due to impact aid diversity testing and so many objectives being met.

Finally, I talked about the issues we're advocating for with our ACSA colleagues. I suggested that "we're all in this together" and that we'd appreciate their support on these issues.

Overall, the presentation was well received and there were some thoughtful questions. Hopefully, this was a positive step toward better relationship with our city and borough counterparts!