



Cooperating School Districts of Greater Kansas City

Stakeholders collaborate to develop CSDGKC's five-year Strategic Plan

2021-2022 ANNUAL REPORT

CSDGKC MISSION

The mission of the Cooperating School Districts of Greater Kansas City is to leverage our members' combined strengths to provide high-quality and cost-effective services and resources to maximize learning for all students.

Cooperating School Districts of Greater Kansas City recently began work on a Strategic Plan with the help of stakeholders from the organization's entire education community.

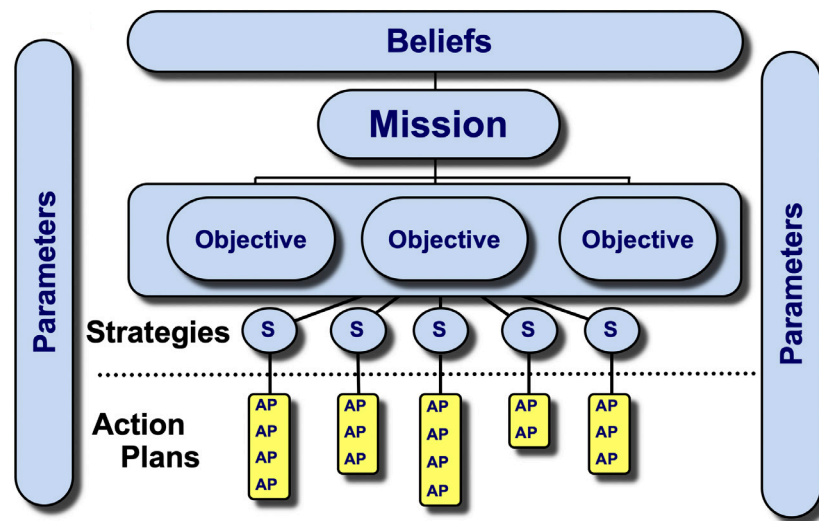
Dr. Lindsey Gunn, Senior Associate of The Cambrian Group, facilitated a two-day planning session during April. For more than 25 years, Dr. Gunn has assisted school districts from throughout the Kansas City metropolitan area in strategic planning and other initiatives. JE Dunn generously hosted the session.

Seventeen participants, representing both school districts and businesses working with CSDGKC, developed the mission, beliefs, objectives, and strategies during the spring meetings. Throughout the two days, the process benefited greatly from the team members' high emphasis on cooperation and collaboration.

CSDGKC Staff will complete the task of identifying action steps to send back to the stakeholders before finalizing the Strategic Plan. A small group of stakeholders will come together during summer 2022 to identify action steps and finalize the Strategic Plan. During the fall, the plan will be on the CSDGKC Board meeting agenda as an item for approval. This plan will be reviewed in two years to determine progress and make possible adjustments as needs change and new solutions are identified.

This comprehensive blueprint will be the third Strategic Plan developed for Cooperating School District's since the organization's formation in 2007.

The Strategic Plan will be shared with all CSDGKC members following approval by the Board of Directors.



MOCAAT UPDATE – APRIL 2022

With the support of Cooperating School Districts of Greater Kansas City and three other sponsoring associations, MOCAAT was officially launched on September 24, 2020, and a Board of Directors was formed to oversee the operations and performance of the Program. MOCAAT engaged with PMA to provide a complete investment program for Missouri school districts. The thought process behind opening a new Local Government Investment Pool (LGIP), was to bring additional competition to the investment market for school districts. Based on the success of MOCAAT over the first 18 months, it is evident that school districts were looking for additional options.

MOCAAT offers a wide range of tools for Missouri schools which include:

- Competitive Liquid Investment Options
- Customized Online Reporting & Transactions
- Cash Flow Management
- Bond Proceeds Management
- Fixed Income Analysis
- Credit Risk Analysis

Upon their retirement from school administration careers, Jason Hoffman and John Jungmann were hired by PMA and began in July 2021 and August 2021 respectively to represent MOCAAT. Since their hire, they have passed the required licensure exams and have been traveling around the state, meeting with superintendents and school business officials to introduce MOCAAT.

The reception to MOCAAT has been very positive. Currently there are 50 districts that have passed the resolution to become a member of MOCAAT. There are another 50+ districts that have had discussions about joining and are considering it. In early April, MOCAAT eclipsed the \$700 million threshold of assets under management.

If you are interested in learning more about MOCAAT, please reach out to John at 417-655-6435 (jjungmann@pmanetwork.com) or Jason at 573-424-2299 (jhoffman@pmanetwork.com).



Legislative efforts include advocacy for public schools and timely updates

With our increasingly unpredictable political climate, legislative advocacy for public education remains vital to school districts. Steve Carroll, CSDGKC Legislative Liaison, continued to provide timely updates and insights throughout the school year with districts receiving weekly reports during the spring 2022 Missouri General Assembly session.

CSDGKC members hear from Mr. Carroll at three meetings during the year where he provides information on anticipated and pending legislation including a comprehensive wrap-up of the Jefferson City spring session at the Annual Meeting in June. During the school year, Mr. Carroll is available to answer questions from superintendents, visiting with CSD district members as time allows.

In fall 2022, CSDGKC superintendents will work together to create the organization's 2023 legislative platform which is shared with all members as well as our political representatives.



Retirement Trust offers strong performance, personalized attention and lower fees

Improving retirement planning and outcomes while reducing employees' costs is the goal of CSD Retirement Trust, which grew to include 59 participating school districts this year. The 10 CSDGKC districts currently participating are Grain Valley, Harrisonville, Independence, Kansas City, Kearney, Lee's Summit, Liberty, Oak Grove, Platte County and Smithville.



The Retirement Trust has grown to include more than 8,500 participants with over \$240 million in plan assets, up from \$214 million last year. Especially noteworthy is that more than 97 percent of the Trust's investment options have surpassed their performance rank in category.

Investment management fees have decreased in 90 percent of the Trust's investment options with participant fees dropping by 59 percent. For example, annual fees for an individual with a \$10,000 account balance decreased from \$118 to just \$49.

The Retirement Trust provides CSDGKC districts with a reliable and appealing alternative to managing these funds and processes in-house. Since the Trust's formation in 2010, members have continued to praise the Trust's emphasis on diversified investment options as well as the personal attention from financial advisors.

For more information about the Retirement Trust's many advantages for districts and staff members, contact Richard Counts, Trust Managing Director, richard@csdretirementtrust.com or Paul Shrout, CSDGKC Director of Business Services, at (816) 753-7275 or pshrout@csdgkc.org.

Education Policy Leadership Program now operating under CSDGKC, expanding to St. Louis and Ozarks

A total of 17 emerging leaders from local school districts completed the Education Policy Leadership Program (EPLP) during the 2021-22 school year with a focus on policy and advocacy at the local, state, and national levels. Beginning in 2021, CSDGKC began overseeing this effort, which was previously known as the Education Policy Fellows Program and attached to the Institute for Education Leadership and the Local Investment Commission.



The EPLP cohort's activities included a visit to the Missouri Legislative Summit in Jefferson City and a trip to Washington, D.C., for the Washington Legislative Summit. Missouri co-directors for the EPLP are Dr. Kenny Southwick, CSDGKC Executive Director; Brad Smith, Drumm Farm Center for Children Executive Director; and Tyson Elbert, Advocacy Build, LLC, Founder and Executive Director.

Individuals interested in joining the EPLP for 2022-23 began applying in May with applications closing in mid June. Membership in this organization is expanding to the St. Louis and Ozarks region during the coming year. If interested in applying for the EPLP program, contact Liz Sedlock at lsedlock@csdgkc.org.

Considering self-insurance? Check out the Self-Insurance Pool of Greater KC

Thanks to the Self-Insurance Pool of Greater Kansas City (SiPGKC), participating school districts are joining forces to gain an advantage when negotiating health insurance benefits and costs. SiPGKC provides a valuable option to districts seeking to reduce expenses and increase control through self-insurance.

The Self-Insurance Pool offers comprehensive preventive and urgent care to its member districts. During the past year, the four SiPGKC districts reported 14,000 patient interactions, saving a combined \$1.4 million in claims costs.

SiPGKC member districts currently include Blue Springs, Fort Osage, Grain Valley and Smithville. To learn how SiPGKC membership can benefit your school district, contact Paul Shrout, CSD's Director of Business Services, at (816) 753-7275 or pshrout@csdgkc.org.

Seventh consecutive year of clean audits from Marr and Company

As part of an ongoing focus on good stewardship and solid financial management, CSDGKC collaborates with Marr and Company, P.C., of Kansas City for an annual comprehensive financial review and analysis. For the seventh year in a row, the recognized firm gave CSDGKC a clean audit during an evaluation of finances, fiscal practices and procedures.

In addition to the annual audit, members of the CSDGKC Board of Directors are kept up-to-date on the organization's finances throughout the year. Board members thoroughly review monthly financial statements and receive information about any variances or changes related to finances.

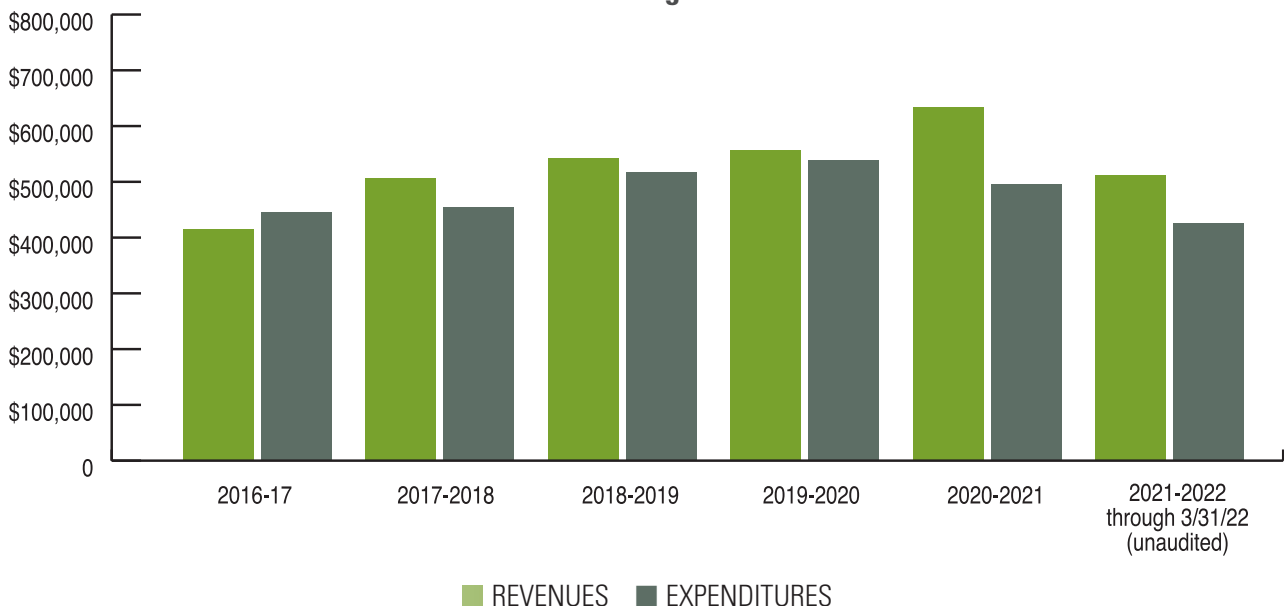
Plans call for Cooperating School Districts to again turn to Marr and Company for the 2022-23 audit.

Revenues 2021-22
through 3/31/22



- Membership Dues
- Associate/Affiliate Membership Dues
- SIPGKC
- Rebates/Administrative Service Fees
- Purchasing Program

CSDGKC Actual Revenues vs. Expenditures
2016-17 through 2021-22



**CSDGKC 2021-22
BOARD OF DIRECTORS**

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CSDGKC Board President
Superintendent, Center School District

Mr. Michael Hackett
CSDGKC Board Vice President
Board Member, Grain Valley School District

Dr. Jason Snodgrass
CSDGKC Board President-Elect
Superintendent, Fort Osage R-1 School District

Dr. Jeanette Cowherd
CSDGKC Board Secretary/Treasurer
Superintendent, Park Hill School District

Dr. Dan Clemens
CSDGKC Board Past President
Superintendent, North Kansas City Schools

Ms. Sarah Lamer
CSDGKC Director
Board Member, Smithville School District

Mr. Jeff Kramer
CSDGKC Director
Superintendent, Archie School District

Dr. Mike Reik
CSDGKC Director
Superintendent, Platte County School District

Ms. Jennifer Wolfsie
CSDGKC Director
Board Member, Kansas City Public Schools

CSDGKC LEADERSHIP

Dr. Kenny Southwick
Executive Director
ksouthwick@csdgkc.org

Mr. Paul Shrout
Director of Business Services
pshrout@csdgkc.org

Ms. Liz Sedlock
Executive Assistant
lsedlock@csdgkc.org

3444 Broadway, Suite 401
Kansas City, MO 64111
816-753-7275

www.csdgkc.org

PDN combines resources to present outstanding professional development opportunities

CSDGKC's Professional Development Network (PDN) is continuing to provide valuable training to area district's educators by combining resources and sharing expertise. A highlight of this past year was a full-day workshop presented by David A. Kilpatrick, PhD, Professor of Psychology at the State University of New York College at Cortland.

A New York state certified school psychologist with 28 years of experience, he has been teaching courses in learning disabilities and educational psychology since 1994. This year's well-attended workshop focused on how children learn to read words and why some children struggle.

"I really appreciated how well David broke down the research and studies that support how to teach kids to read," shared one participant. "I left the workshop with some ideas for how to determine specific areas that kids might need explicit instruction in."

Based on the workshop reviews, the PDN is working to bring Dr. Kilpatrick back next year to further address these topics. In addition, the PDN recently surveyed members to better determine professional development needs with plans to implement many of these suggestions during 2022-23.

Thank you to the following PDN Executive Board Members who guide CSDGKC efforts in this important area:

- Eric Flack - Lee's Summit
- Brian Huff – Raytown
- Mike Kimbrel – Park Hill
- Prissy LeMay – Independence
- Beth Mulvey – Grain Valley
- Becky Nace – Kansas City
- Bryce Johnson – Blue Springs
- Kristin Havens – North Kansas City
- Alicia Casey – Platte County

Members of CSDGKC

FULL MEMBERS OF CSDGKC

Adrian	Lee A. Tolbert
Archie	Lee's Summit
Belton	Lexington
Blue Springs	Liberty
Center	Lone Jack
Excelsior Springs	North Kansas City
Fort Osage	Oak Grove
Grain Valley	Park Hill
Grandview	Platte County
Harrisonville	Pleasant Hill
Hickman Mills	Raymore-Peculiar
Independence	Raytown
Kansas City	Richmond
Kearney	St. Joseph
Knob Noster	Smithville
Lathrop	West Platte

MOCAAT MEMBERS

Belton
Blue Springs
Excelsior Springs
Fort Osage
Grandview
Harrisonville
Kansas City
Kearney
Lee's Summit
Liberty

PDN-ONLY MEMBERS

Academy for Integrated Arts
Crossroads
Guadalupe Centers
St. Therese

SIPGKC MEMBERS

Blue Springs
Fort Osage
Grain Valley
Smithville

CSD RETIREMENT TRUST MEMBERS

Grain Valley
Harrisonville
Independence
Kansas City
Kearney
Lee's Summit
Liberty
Oak Grove
Platte County
Smithville

Education/Corporate Supporters

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Grand Canyon University
Metropolitan Community College
Mid-Continent Public Library
Western Governors University - Missouri

AFFILIATE MEMBERS

Gold Membership
Artisun Solar
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JE Dunn Construction
McCownGordon Construction
MOCAAT
Newkirk Novak Construction Partners
Spencer Fane

Silver Membership

American Fidelity
Hollis+Miller Architects
k12itc
Kincaid IT

Bronze Membership

BlueCross BlueShield of Kansas City
CBIZ
Navitas
Satchel Pulse
Security Benefit
Trane Technologies

