



2022-2023 ANNUAL REPORT

CSDGKC MISSION

The mission of CSDGKC, the unifying agent in our commitment to all students, is to strengthen our educational community through collaborative partnerships, innovative learning opportunities, collective advocacy, and high-quality resources necessary for students to thrive.

Cooperating School Districts of Greater Kansas City

Speaking with one voice to protect and promote public education is focus of CSDGKC Strategic Plan

Individuals and organizations dedicated to harming public education's reputation have used consistent messages and campaigns to promote funding for private schools and vouchers. To address these well-organized regional and national efforts, CSDGKC is developing a Strategic Plan designed to build support for public schools and educators.



Our Strategic Plan's launch is scheduled to take place as students return to school in August. CSDGKC will be working with member districts to implement the research-based plan with components including a campaign microsite, a storytelling process, social media advertising, media pitches, a campaign kit and training for districts.

Nicole Kirby of CESO Communications has worked with CSDGKC to complete the research step, including both primary and qualitative research. An important component of this effort has been listening to our organizational leaders and stakeholders with focus groups targeting superintendents, district administrators, principals, teachers, and community members.

In addition, Mrs. Kirby has reviewed secondary research focusing on data-based recommendations for effective messaging in support of public schools, especially information from researcher Anat Shenker-Osario. This opinion research will be incorporated into our Strategic Plan and provides direction on language that resonates with people as well as messages best avoided.

During the spring, the CESO Communications team developed the plan's messaging along with campaign objectives, strategies, and tactics – all based on feedback from this research. Plans also call for CSDGKC's staff to review the messaging and plan before it is finalized and made available to member districts.

Gain negotiating advantages and reduce costs by joining Self-Insurance Pool of Greater KC

Is your district considering self-insurance for your employees and families? CSDGKC provides member districts with a significant advantage in negotiating health insurance benefits and costs. Through the Self-Insurance Pool of Greater Kansas City, school districts are able to work together to reach more favorable agreements for health insurance coverage.

With health insurance costs continuing to increase, self-insurance can give your district a powerful negotiation tool. This allows you to better manage costs for both your organization and your employees. The Self-Insurance Pool covers your district's employees, their families, and your retirees.

Current members of the Self-Insurance Pool include Blue Springs, Fort Osage, Grain Valley, and Smithville. For more information about the advantages of self-insurance and CSDGKC's pool, contact Paul Shrout, CSDGKC's Director of Business Services, at (816) 753-7275 or pshrout@csdgkc.org.

MOCAAT offers enhanced opportunities for additional investment market competition

Since its formation in fall 2020, Missouri Capital Asset Advantage Treasury (MOCAAT) has grown dramatically, more than tripling its member districts since last year. As of spring 2023, a total of 156 school districts had passed resolutions to join MOCAAT with 114 districts making investments. More than 20 additional districts passed or were planning to approve resolutions during April.

MOCAAT eclipsed the \$1 billion mark in July 2022 and ended the previous calendar year with \$1.1 billion worth of funds under management. After a successful property-tax season during 2023's first quarter, funds under management totaled just under \$2.1 billion by the end of March.

Tools available for Missouri school districts include:

- Competitive liquid investment options
- Customized online reporting and transactions
- Cash flow management
- Bond proceeds management
- Fixed income analysis
- Credit risk analysis

CSDGKC was one of four sponsoring organizations engaging with PMA to form MOCAAT to provide a complete investment program for Missouri districts. An additional goal was to bring more competition to the investment market for school districts. The launch in 2020 included establishment of a MOCAAT Board of Directors to oversee operations and performance of this new Local Government Investment Pool (LGIP).

Jason Hoffman and John Jungmann, both retired school district administrators, have been employed by PMA to represent MOCAAT since summer 2021.

With the ongoing membership growth and its fiscal management success, MOCAAT is definitely providing a much-needed resource for school districts. To learn more about the Missouri Capital Asset Advantage Treasury, contact John Jungmann at 417-228-4148 or jjungmann@pmanetwork.com or contact Jason Hoffman at 573-212-6258 or jhoffman@pmanetwork.com.

Associate and affiliate members provide support to CSDGKC while helping us keep dues low

Both associate and affiliate memberships in CSDGKC are offered to organizations that support public education. Associate memberships are available to educational organizations and institutions with affiliate memberships offered to business organizations and vendors.

Affiliate and associate status provides a point of connection and involvement with CSDGKC's mission and goals for these education and corporate supporters that work with, support and seek to do business with CSDGKC member districts.

Our member districts also benefit from these organizations since the associate and affiliate membership program has helped CSDGKC keep dues at \$2 per student since 2007. While CSDGKC cannot endorse these affiliate and corporate members, we are grateful for their involvement and support of public education in the Greater Kansas City area.

Legislative advocacy and up-to-date information helps districts weather volatile political times

Keeping our district leaders informed about pending legislation and advocating on behalf of our combined membership is an important goal for CSDGKC. Our legislative liaison, Steve Carroll, has worked with Cooperating School Districts for a number of years, providing insight and timely updates throughout each Missouri General Assembly session.

To further increase our influence in Jefferson City, CSDGKC superintendents work together each fall to develop our legislative platform and agendas. These serve as a concise and easy-to-understand guide for our organization's advocacy. In addition, the platform and agendas are shared annually with our membership and our districts' representatives and senators at the Missouri capitol.

During each General Assembly session, Mr. Carroll creates a weekly report for our member districts. He is also available to answer questions from superintendents and schedules meetings with our members as time allows.

In addition to his advocacy work during the General Assembly sessions, Mr. Carroll shares information at three annual CSDGKC meetings. These well-received presentations include a thorough wrap-up of the General Assembly session during June and a preview of anticipated and pending legislation at two other meetings.

Marr and Company gives CSDGKC a clean audit for eighth consecutive year

CSDGKC undergoes a comprehensive audit focusing on finances, fiscal practices and procedures on an annual basis. We are pleased to report that Marr and Company, P.C., of Kansas City has awarded CSDGKC a clean audit for 2021-22 following a thorough evaluation.

The audit is one aspect of our organization's continuing emphasis on solid financial management and careful stewardship. It also helps ensure that CSDGKC is using its resources wisely while employing best practices in the areas of financial management, procedures, and standards.

In addition to the annual audit, the CSDGKC Board of Directors reviews our organization's financial statements each month and receives information related to any changes or variances related to finances.

Marr and Company, a recognized accounting firm, will also conduct CSDGKC's next audit.



Enhancing retirement planning and outcomes for members through CSDGKC Retirement Trust

A growing number of districts are reaping the benefits of solid investment management through our Retirement Trust. Launched in 2010, the Trust was developed to offer school districts an appealing and reliable alternative to managing investment funds and processes in-house.

This year, Cooperating School District's Retirement Trust increased its total membership from 59 to 68 participating districts. Members added in 2023 included districts located in Arkansas, Colorado, and North Dakota. They join members from Missouri, Kansas, and Wisconsin. CSDGKC members participating in the Retirement Trust currently total 10 and include Grain Valley, Harrisonville, Independence, Kansas City, Kearney, Lee's Summit, Liberty, Oak Grove, Platte County and Smithville.

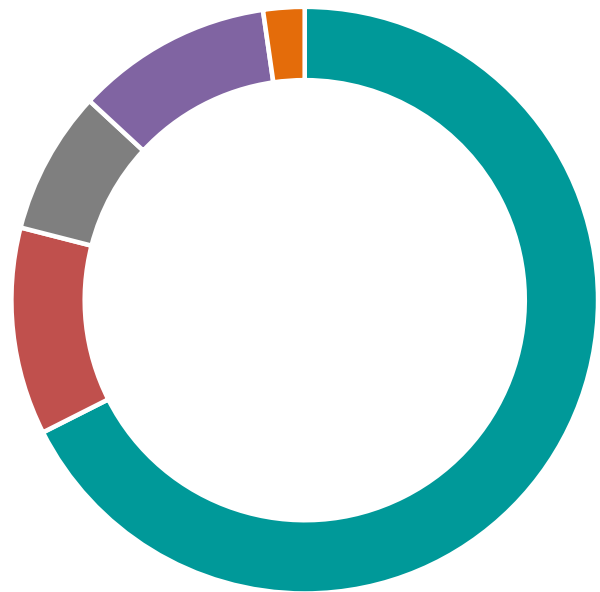
The Retirement Trust also continues to gain individual participants, increasing from 8,500 last year to around 9,000 today. Plan assets currently totaling more than \$211 million make up the Trust. CSD is proud to report that 88 percent of our Trust's investment options have outperformed Morningstar category peers when compared over 10 years.

Throughout the last 13 years, the Retirement Trust has emphasized diversified investment options while also providing personal attention from qualified financial advisors.

A major advantage of CSD's Retirement Trust is its reasonable management fees, which decreased in 90 percent of the Trust's investment options. Participant fees were also reduced by 59 percent. For an individual investor with \$10,000, for example, annual fees fell from \$118 to \$49.

To learn how the Retirement Trust can benefit your district and staff members, contact Richard Counts, Trust Managing Director at richard@csdretirementtrust.com or Paul Shrout, CSDGKC Director of Business Services, at (816) 753-7275 or pshrout@csdgkc.org.

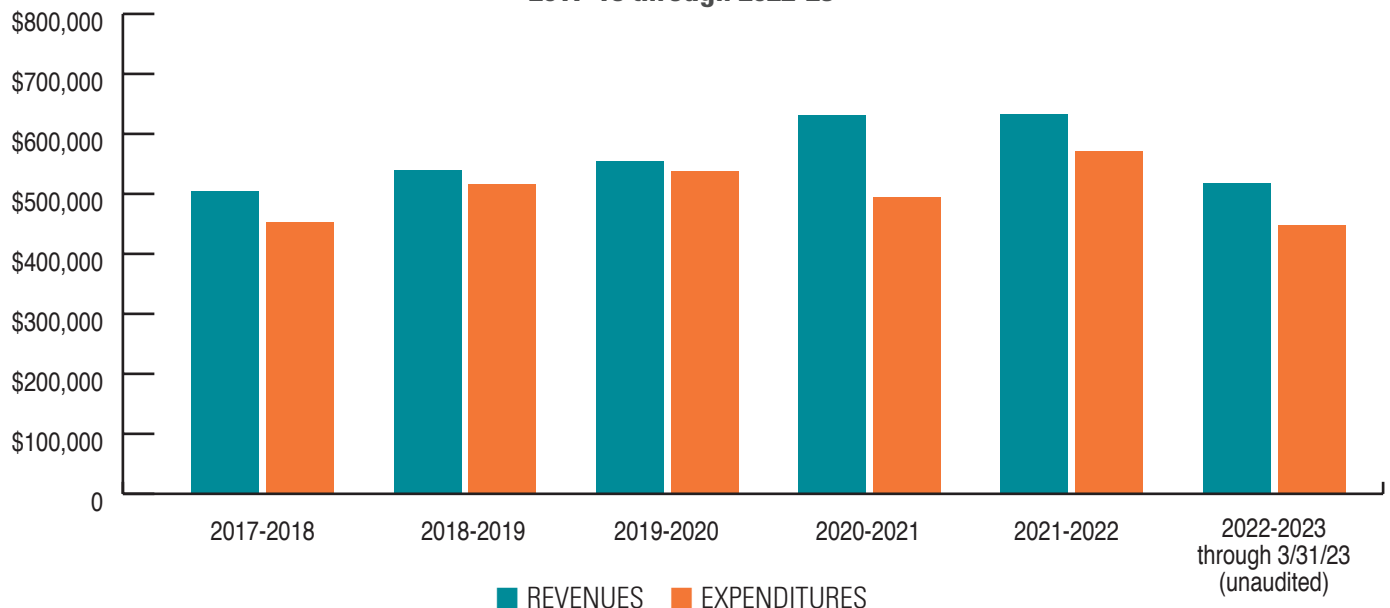
Revenues 2022-23 through 3/31/23



- Membership Dues
- Associate/Affiliate Membership Dues
- SIPGKC
- Rebates/Administrative Service Fees
- Miscellaneous

CSDGKC Actual Revenues vs. Expenditures

2017-18 through 2022-23



**CSDGKC 2022-23
BOARD OF DIRECTORS**

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

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

Dr. Jeremy Tucker
CSDGKC Board President-Elect
Superintendent, Liberty Public
Schools

Dr. Kenny Rodriquez
CSDGKC Board Secretary/Treasurer
Superintendent, Grandview C-4
Schools

Dr. Yolanda Cargile
CSDGKC Board Past President
Superintendent, Center School District

Ms. Kathy Butler
CSDGKC Director
Superintendent, Lone Jack C-6
School District

Dr. Dan Clemens
CSDGKC Director
Superintendent, North Kansas City
Schools

Ms. Jill Esry
CSDGKC Director
Board Member, Independence
School District

Ms. Rhonda Gilstrap
CSDGKC Director
Board Member, Blue Springs
School District

CSDGKC LEADERSHIP

Dr. Kenny Southwick
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Mr. Paul Shrout
Director of Business Services
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Ms. Liz Sedlock
Executive Assistant
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A wide range of high-quality professional development available to educators via PDN

CSDGKC's Professional Development Network (PDN) is continuing to focus on meeting the needs of our member districts. The PDN is currently promoting "push-in" services by bringing professional development into the schools rather than pulling teachers out of their classrooms. Through this school-based effort, we combine resources and share expertise to provide outstanding training to our districts' educators.

For the 2023-24 school year, CSDGKC's Professional Development Network will offer a valuable opportunity to seven districts (one elementary school per district) by funding a pilot I AM Noticed program.

I AM Noticed is a recognized tier 2, proactive approach to mental wellness, SEL and belonging. This type of "push-in" programming does not require districts to hire subs for their participating teachers. The PDN will also coordinate with the Real World Learning (RWL) Hub at the Kauffman Foundation to provide opportunities for a variety of additional professional development and learning opportunities.

CSDGKC continues to be grateful to the following PDN Executive Board Members who guide our work in this key area:

- Eric Flack - Lee's Summit
- Marilyn Cannon - Raytown
- Jasmine Briedwell – Park Hill
- Prissy LeMay – Grandview
- Pam Boatright - Independence
- 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	Plaza Heights
Hickman Mills	Raymore-Peculiar
Independence	Raytown
Kansas City	Richmond
Kearney	St. Joseph
Knob Noster	Smithville
Lathrop	West Platte

MOCAAT MEMBERS

Belton	Lathrop
Blue Springs	Lee's Summit
Excelsior Springs	Liberty
Fort Osage	Oak Grove
Grain Valley	Park Hill
Grandview	Raymore-Peculiar
Harrisonville	Raytown
Hickman Mills	Richmond
Kansas City	St. Joseph
Kearney	Smithville
Knob Noster	West Platte

PDN-ONLY MEMBERS

Academy for Integrated Arts
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

ASSOCIATE MEMBERS

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

AFFILIATE MEMBERS

Gold Membership
ConvergeOne
CSD Retirement Trust
EdCounsel, LLC
Guin Mundorf, LLC
Incite Design
JE Dunn
MOCAAT
Newkirk Novak

Silver Membership

American Fidelity
Hollis+Miller
k12itc
Kincaid IT
Logicalis
McCownGordon

Bronze Membership

BlueCross BlueShield of Kansas City
CBIZ
Navitas
Security Benefit
Solution Tree / Marzano Resources
Spencer Fane
Trane Technologies

