



2023-2024 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

Our Kids, Our Communities, Our Future communications campaign shares public schools' triumph

Since launching our campaign in support of public schools, Cooperating School Districts has already reached thousands of people with this positive message. The communications campaign – known as Our Kids, Our Communities, Our Future – is a key component of CSD's Strategic Plan and includes positive stories from our member districts as well as a user-friendly tool kit for districts.



The campaign combats the negative narratives often shared by powerful and well-funded organizations advocating that public tax dollars be diverted to private, unregulated schools.

"The real stories of how our public schools help our kids and our communities thrive," is the tagline for the campaign. The stories have been viewed by more than 600,000 people on Facebook and nearly 200,000 on Instagram as well as additional engagement through Google search ads, LinkedIn and Twitter (X).

CESO Communications collaborated with CSDGKC to conduct research and develop messaging recommendations based on both primary and qualitative research results. Using this information along with secondary research about enhancing support of public schools, CESO and CSDGKC staff finalized the content and components of the toolkit for districts. A new webpage – <https://ourkidsgkc.org/> – was also developed to share the good news from our local schools and emphasize public education's role as the cornerstone of our communities.

Resources for member districts include the campaign webpage, a storytelling process, social media advertising, media pitches, a campaign kit and training for districts.

The featured stories celebrate public schools, demonstrate the importance of positive relationships between school staff and students and highlight innovative options and the rewards of teaching, said Nicole Kirby, CESO Communications senior strategist.

Various districts have been featured as part of the campaign with each story designed to be both memorable and touch people's hearts. One especially heartwarming story focused on the Spill the Beans coffee shop at the LEAD Center in the Raymore-Peculiar School District.

"We really got to know these kids and learned how this program is changing their lives," Kirby said, "and I hope that comes through in the story."

CSDGKC's Strategic Plan was finalized approximately two years ago and is the organization's third comprehensive blueprint. Our Kids, Our Communities, Our Future officially began at a kickoff event, held in September 2023 at the Kauffman Center with around 120 educators, community members and elected officials attending as well as Missouri's Commissioner of Education Dr. Margie Vandeven.

Self-Insurance Pool gives districts additional clout when negotiating plans and rates

School districts participating in Cooperating School District's Self-Insurance Pool of Greater Kansas City (SiPGKC) are combining resources to better serve their employees and their families. By working together, the districts have a distinct advantage when negotiating health insurance benefits and costs.

Participating districts' staff members, their spouses and dependents as well retirees from the SiPGKC member districts have the opportunity to participate in quality health coverage plans through the insurance pool.

To learn more about how self insurance and the SiPGKC can benefit your school district, contact Paul Shrout, CSD's director of business services, at (816) 753-7275 or pshrout@csdsgkc.org.

Retirement Trust offers strong performance, personalized attention and lower fees

Improving retirement planning and outcomes while reducing employees' costs is the goal of the CSD Retirement Trust, which grew to include 68 participating school districts in 2023. The Trust's geographic boundaries now encompass districts from Missouri, Wisconsin, Kansas and North Dakota. The 10 CSDGKC districts currently participating are Grain Valley, Harrisonville, Independence, Kansas City, Kearney, Lee's Summit, Liberty, Oak Grove, Platte County and Smithville.

In addition to a robust platform of well-diversified investment options containing high-performing funds, the Trust expanded its value-added services that assist a participant with total financial wellness support. Got Zoom and Savvi provide participants with student loan debt management and repayment solutions.

In 2024, the Trust launched a new partnership with Best Money Moves, a comprehensive web-based suite of tools that enables employees to make smarter financial decisions unique to their individual circumstances. All of these services are offered at no cost to districts or their employees.

Growth continued in 2023, with the Trust now serving more than 9,600 participants with over \$256 million in plan assets. Especially noteworthy is that over 90 percent of the Trust's investment options

have outperformed Morningstar category peers on a 10-year performance basis.

The success of the Retirement Trust is reflected in its ability to lower investment management fees, thereby passing along those cost savings to its participants through reduced fees. During the 2023 Plan year, the Trust's annual headcount fee and rep fee were both reduced. Since the launch of the Trust in 2010, total investment management fees for an individual with a \$10,000 account balance decreased to just \$39 (from \$118). Investment management fees have decreased in 90 percent of the Trust's investment options.

The Retirement Trust provides CSDGKC districts with a reliable, appealing alternative to managing these funds and processes in-house. Since the Trust's formation, 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, managing director, at (314) 703-0408 or richard@csdretirementtrust.com or Paul Shrout, CSDGKC director of business services, at (816) 753-7275 or pshrout@csdggkc.org.

Since forming in 2020, MOCAAT already has \$3 billion worth of funds under management with growth expected

The Missouri Capital Asset Advantage Treasury (MOCAAT) recently crossed the \$3 billion milestone of funds under management. Launched in 2020 with the support of Cooperating School Districts and three other organizations, MOCAAT's goals include providing a complete investment program for Missouri school districts while also bringing additional competition to the investment market for districts.

MOCAAT has its own Board of Directors who oversee both operations and performance of this Local Government Investment Pool. Based on the success of MOCAAT during its first years, it is evident that school districts are seeking additional options.

As of April, a total of 215 districts had approved resolutions to join MOCAAT with 175 of these member districts making investments. At least 10 other districts have either passed or are planning to approve resolutions during spring 2024 with the intention of opening accounts.

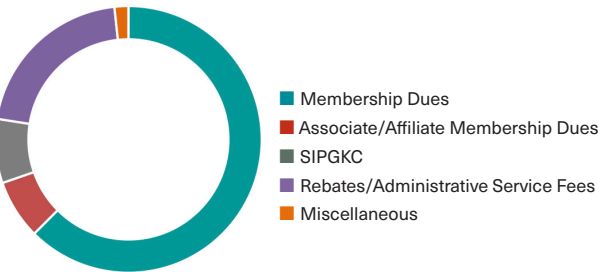
Prospects for additional growth remain high as Missouri districts are placing ballot issues before voters for more than 60 bond issues totaling over \$800 million in spring 2024.

As the news about MOCAAT spreads, other municipalities have reached out for investment help with several non-school accounts now included. MOCAAT officials are also working to further expand and offer assistance to political subdivisions such as fire and ambulance districts, library districts, community colleges, cities and counties.

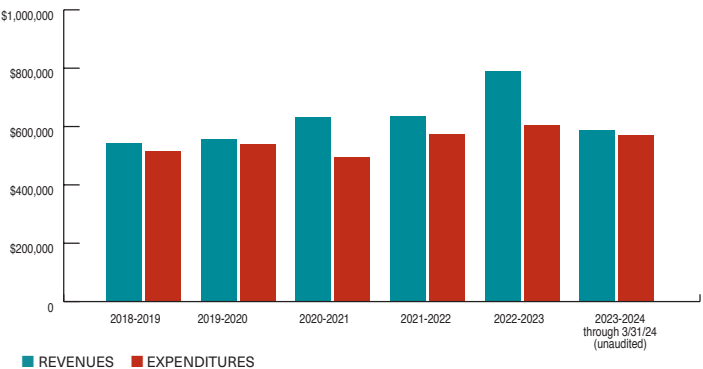
Tools available through MOCAAT include competitive liquid investment options, customized online reporting and transactions, cash flow management, bond proceeds management, fixed income analysis and credit risk analysis.

Retired school administrators Jason Hoffman and John Jungmann have represented MOCAAT since 2021 with Dr. Paul Ziegler, also a retired district administrator, joining the team part time in October 2023. To learn more about how MOCAAT can provide important resources for your district, contact John Jungmann at 417-228-4148 or jjungmann@pmanetwork.com or Jason Hoffman at 573-212-6258 or jhoffman@pmanetwork.com.

Revenues 2023-24
through 3/31/24



Actual Revenues vs. Expenditures
2018-19 through 2023-24



Thorough review of CSDGKC's finances results in ninth consecutive clean audit

Cooperating School Districts understands the importance of solid fiscal management, stewardship and transparency. With these tenets in mind, our organization conducts an annual audit focusing on finances, fiscal practices and procedures. For the 2022-23 year, CSD once again received a clean audit from Marr and Company, a respected Kansas City firm.

We are proud to report that this is the ninth consecutive year CSD has earned a clean audit.

Each annual audit is reviewed by our CSDGKC Board of Directors. To stay current throughout the year, our governing board also receives our organization's monthly financial statements along with updates related to any changes related to CSD's overall finances.

Board members have been pleased with Marr and Company's thorough approach to the annual audit, and plans call for the company to conduct CSDGKC's next financial review.

PDN combines resources to present outstanding professional development opportunities

Among CSDGKC's well-received Professional Development Network (PDN) sessions this past year was our "Crucial Conversations" workshop. Designed for school and district leaders as well as teacher leadership positions such as instructional coaches, department leads or aspiring leaders, the training focused on dialogue principles and practical skills that were explained and demonstrated through numerous examples.

Workshop participants learned how to talk to anyone about virtually any topic, no matter how sensitive. By learning how to better handle crucial conversations and help everyone get what they want, school leaders also improve the quality of their professional relationships while meeting career goals.

During 2023-24, the PDN also assisted with the A4LE Empowering Education Conference and provided funding for seven districts to pilot the "I AM Noticed" program in one of their elementary schools. I AM Noticed is a tier 1, proactive approach to mental wellness, SEL and belonging.

The PDN continues to focus on meeting the needs of our member districts by combining resources and sharing expertise. Currently the PDN is promoting "push-in" services by bringing professional development into the schools rather than pulling teachers out of the classroom.

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

- Kristen Merrell – Lee's Summit
- Tyler Britt- Raytown
- Jasmine Briedwell – Park Hill
- Prissy LeMay – Grandview
- Pam Boatright - Independence
- Becky Nace – Kansas City
- Bryce Johnson– Blue Springs
- Becky Kroenke – North Kansas City
- Andrea Wilson – Liberty
- Emily Cross – Fort Osage
- Al Voelker – Raymore-Peculiar

Advancing knowledge about educational policy leadership through EPLP and AEPLP participation

Helping education leaders advocate for public schools remains a primary focus for CSDGKC with the Advanced Education Policy Leadership Program (AEPLP) supporting national efforts and the Education Policy Leadership Program (EPLP) emphasizing state policy and legislation.

Five leaders from our member districts completed the AEPLP during 2023-24, working with peers from other states to build additional skills that support public policy. The AEPLP includes leaders from Missouri, Kansas, Massachusetts, Minnesota, New York, Ohio and Pennsylvania. Through the program, education professionals participate in five three-hour Zoom meetings and an in-person symposium held during September in Washington, D.C. Collaborative groups among the participants also work together to complete a written policy analysis document and oral presentation.

To participate in the AEPLP program, individuals must have completed a state-level education policy program or institute.

A total of 29 participants, including 20 fellows from Missouri and nine from Kansas, participated in the EPLP. They took part in six full-day seminars in Kansas City, an overnight state policy seminar in Jefferson City or Topeka, an additional six remote access meetings and a national policy seminar in Washington, D.C.



Liaison Steve Carroll has helped CSDGKC navigate legislation since 2016

Staying informed about pending and new legislation can be challenging, especially considering the ongoing political turmoil in Jefferson City. Working together with our superintendents, CSDGKC develops an annual legislative platform to help education advocates better communicate with both elected officials and their communities.

For the past eight years, Steve Carroll has served as the primary voice for CSDGKC and our member districts in Jefferson City. During General Assembly sessions, he provides a concise, easy-to-understand report each week for district leaders. His up-to-date information and insights are a valuable resource for education professionals and our community advocates.

A member of the Missouri House of Representatives from 1984 to 1994, Mr. Carroll has served as a legislative liaison for various organizations for 30 years. He continues to be well-respected by elected officials in Jefferson City and meets with them on a regular basis to monitor legislation related to K-12 education.

CSDGKC 2023-24 BOARD

Dr. Jeremy Tucker

CSDGKC Board President
Superintendent, Liberty Public Schools

Ms. Rhonda Gilstrap

CSDGKC Board Vice President
Board Member, Blue Springs School District

Dr. Kenny Rodriquez

CSDGKC Board President-Elect
Superintendent, Grandview C-4 Schools

Ms. Kathy Butler

CSDGKC Board Secretary/Treasurer
Superintendent, Lone Jack C-6 School District

Dr. Jason Snodgrass

CSDGKC Board Past President
Superintendent, Fort Osage School District

Dr. Yolanda Cargile

CSDGKC Director
Superintendent, Center School District

Dr. Dan Clemens – retired 12/31/23

CSDGKC Director
Superintendent, North Kansas City Schools

Dr. Rochel Daniels

CSDGKC Director – Appointed 2/2/24
Superintendent, North Kansas City Schools

Dr. Jill Esry

CSDGKC Director
Board Member, Independence School District

Mr. Tray Harkins

CSDGKC Director
Board Member, Excelsior Springs School District

CSDGKC LEADERSHIP

Dr. Kenny Southwick

Executive Director
ksouthwick@csgdkc.org

Mr. Paul Shrout

Director of Business Services
pshrout@csgdkc.org

Ms. Liz Sedlock

Executive Assistant
lsedlock@csgdkc.org

4900 Main St., Suite 155
Kansas City, MO 64112
816-753-7275

www.csgdkc.org

Members of CSDGKC

FULL MEMBERS OF CSDGKC

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

MOCAAT MEMBERS

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

PDN-ONLY MEMBERS

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

CSDGKC receives valuable support from our associate and affiliate members

Ever wonder how CSDGKC has managed to keep its dues at \$2 per student for the past 17 years? In addition to excellent financial management by our Board of Directors and staff members, our organization continues to benefit from the support of both associate and affiliate members.

Associate and affiliate memberships are available to organizations that support public education but are not among our metro-area public school districts. Educational organizations and institutions may sign up as associate members while businesses and vendors are eligible to become affiliate members.

In addition to the impact on CSD's financial wellbeing, the associate and affiliate members help support both our mission and goals and often work closely with our districts on collaborative efforts in numerous areas related to our public schools.

With gratitude to Dr. Dan Clemens, retiring CSDGKC Board member

Our sincerest thanks go to Dr. Dan Clemens, who retired from the CSDGKC Board of Directors as well as his position as superintendent for the North Kansas City School District in December 2023. Dr. Clemens joined the CSD Board in July 2018.

Our organization also welcomed Dr. Rochel Daniels, NKC superintendent, to the Cooperating School Districts Board in early February. Dr. Daniels is completing Dr. Clemens' term, which expires on June 30, 2024, when she will be up for election for the Board position.

Education/Corporate Supporters

ASSOCIATE MEMBERS

Grand Canyon University
Western Governors University - Missouri

AFFILIATE MEMBERS

Gold Membership

ConvergeOne
CSD Retirement Trust
EdCounsel, LLC
Guin Mundorf, LLC
JE Dunn
Just Right Reader
MOCAAT
Newkirk Novak

Bronze Membership

BlueCross BlueShield of Kansas City
CBIZ
ExcellenceK12
Incite Design
Security Benefit
Solution Tree / Marzano Resources
Spencer Fane
Tech Electronics
Trane Technologies
USI

Silver Membership

American Fidelity
Fre3dom Interiors
Hollis+Miller
k12itc
McCownGordon

