



2024-2025 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

Professional Development Network's insightful sessions for 2024-25 includes AI-Powered Education Exchange

With the rapid expansion of artificial intelligence, how to successfully plan for and use AI has become an important topic for school leaders. To help address this growing interest, CSDGKC's Professional Development Network (PDN) presented the AI-Powered Education Exchange in March, sharing insights and practical applications to empower the future of AI in our schools.

The event was designed for instructional technology coaches/specialists, library media specialists, curriculum specialists and building and district leaders with participants able to connect, learn and collaborate with fellow educators.

"We had several leaders and learning coaches attend this event," said Dr. Andrea Wilson, an administrator from Liberty Public Schools and PDN Executive Board member. "Each of them said how amazing it was and hoped we would offer it again. I think that is a true testament to the intentional work that went into planning the event. Bravo to all who helped!"

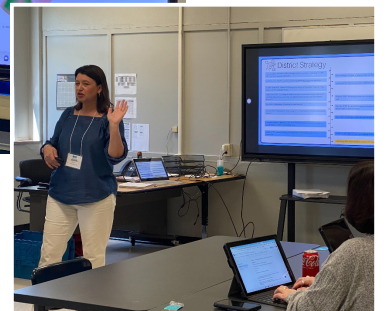
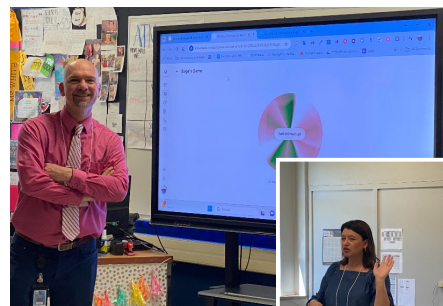
The AI-Powered Education Exchange featured keynote speaker Eric Curts, a technology integration specialist at Stark-Portage Area Computer Consortium in Ohio as well as a Google Education trainer and innovator. He also presented sessions focusing on AI basics for educators, leveraging AI and how to develop an AI action plan for your district.

Participants had the opportunity to select from a variety of related sessions offered by PDN members such as AI applications for teachers, AI policies and procedures, managing AI in schools, using AI literacy to empower future-ready thinkers, unleashing your inner efficiency, the future of feedback-guided grading, AI for reluctant district and building leaders and AI tools to boost classroom creativity.

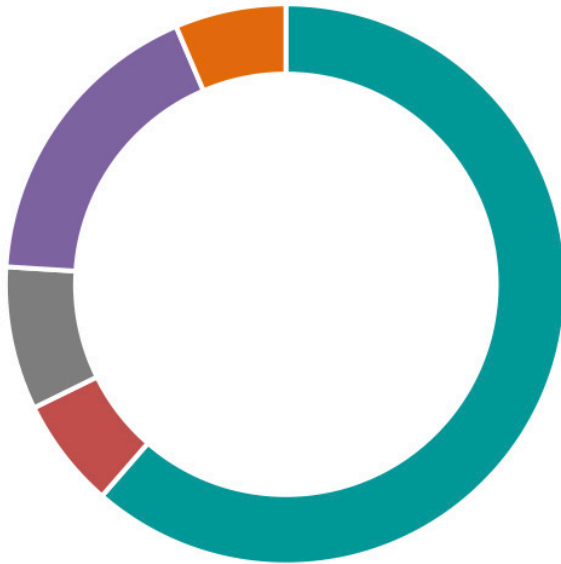
Other PDN offerings this year continued the focus on meeting the needs of CSDGKC's member districts. Through PDN support, five schools experienced the "I AM Noticed" integrated professional development, schoolwide implementation, curriculum usage and program support for 2024-25. Participating schools included Stonegate Elementary (Raymore-Peculiar), Meadowmere Elementary, (Grandview), Lexington High School (Lexington) Academy for Integrated Arts, and Plaza Heights Christian Academy Elementary.

We continue to be grateful to the following PDN Executive Board members who lead CSDGKC efforts in this important 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
- Brett Potts – North Kansas City
- Andrea Wilson – Liberty
- Emily Cross – Fort Osage
- Al Voelker – Raymore-Peculiar



Revenues 2024-25 through 3/31/25



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

Helping Missouri public school community by supporting Success-Ready Students Network

Cooperating School Districts of Greater Kansas City is joining forces with the Success-Ready Students Network (SRSN) to support Missouri public school stakeholders with a focus on developing innovative ways to address competency assessments and personalize learning. The effort seeks to ensure that every student has the knowledge, skills and dispositions they need to be high-school, college, career and workplace ready.

"The SRSN is collaborating with CSDGKC to submit and secure funding from the Kauffman Foundation that provides mission critical resources that fund the SRSN facilitators and research for school innovation waiver districts," said Dr. Mike Fulton, lead facilitator for the Success-Ready Students Network. "These essential funds have kept the SRSN lights on as the SRSN works to transition to longer term funding sources including those from the Missouri Department of Elementary and Secondary Education."

The Network currently includes 114 of Missouri's 599 local education agencies, serving more than half of all K-12 students and teachers in Missouri public schools, Dr. Fulton added, with major education groups and higher education also involved.

"The SRSN thrives because network members like the CSDGKC do their part to carry the water that nourishes and helps grow the collective impact of this important and essential work statewide," he said.

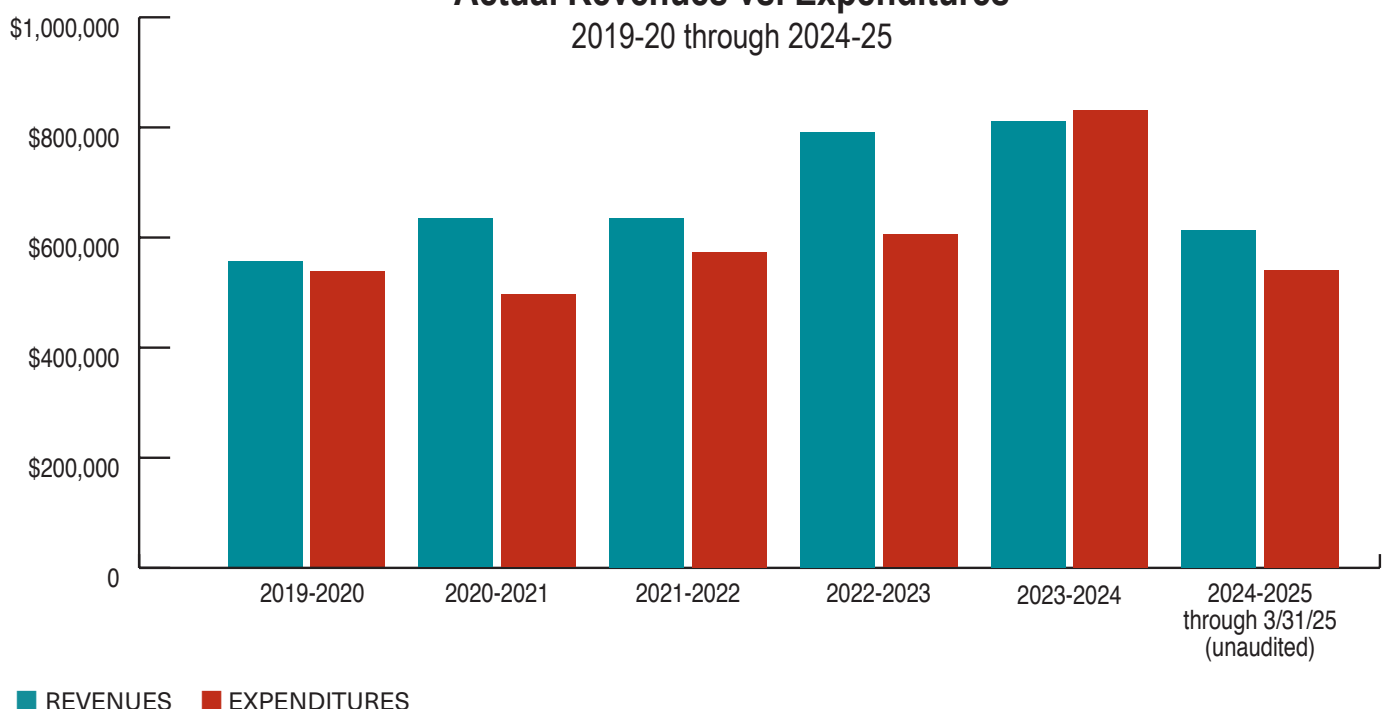
Working in partnership with Missouri DESE, the Network develops innovative approaches to state assessment and accountability to support student mastery in important learning, engagement and real-world learning as well as attainment of Market Value Assets, Dr. Fulton shared.

"This comprehensive reimagining of assessment and accountability intends to create a culture of continuous improvement that supports districts and recognizes the great work they are doing to meet their students' needs," he said.

Dr. Kenny Southwick, CSDGKC executive director, added, "This is another way we support CSDGKC districts and districts statewide."



Actual Revenues vs. Expenditures 2019-20 through 2024-25



Struggling with health insurance costs? Consider Cooperating School District's self-insurance pool

At Cooperating School Districts, we frequently hear from member districts about the challenges of providing quality, affordable health insurance for employees and their families. For districts considering self-insurance, CSDGKC continues to provide its members with a significant advantage when it comes to negotiating health insurance costs and benefits.

The pool is designed to help districts better manage costs for both the organization and its employees. A total of four districts – Blue Springs, Fort Osage, Grain Valley, and Smithville – are currently enrolled in Cooperating School District's Self-Insurance Pool of Greater Kansas City, also known as SiPGKC. The pool covers district employees, their families and retirees. The SiPGKC pool is pleased to welcome the Platte County School District as a new member of the pool beginning July 1, 2025.

For more information about the advantages of self-insurance and SiPGKC, contact Paul Shrout, CSDGKC director of business services, at (816) 753-7275 or pshrout@csdgkc.org.

Advocacy programs give educators the tools they need to support public education at state and national levels

The escalating turmoil in education-related legislation and ongoing funding uncertainty has only increased the value of CSDGKC's Advanced Education Policy Leadership Program (AEPLP) and Education Policy Leadership Program (EPLP).

"It's vital in the times that we live," said Dr. Kenny Southwick, executive director at CSDGKC. "The advocacy programs and skills they develop through these programs are more important than ever."

AEPLP was developed to support national efforts, and EPLP focuses on state policy and legislation.

Additional Missouri and Kansas school districts are becoming involved in EPLP with 25 Missouri fellows participating, up from 20 last year, and a total of 13 Kansas fellows involved, a jump from nine last year.

EPLP fellows attend six full-day seminars as well as an overnight state policy seminar in either Jefferson City or Topeka. The group members also take part in six virtual meetings and a national policy seminar in Washington, D.C.

To participate in the national program, AEPLP fellows must first complete the EPLP program. In 2024-25, six education leaders from Kansas and Missouri joined the AEPLP group with other participants coming from the following states: Missouri, Kansas, Massachusetts, Minnesota, New York, Ohio and Pennsylvania.

AEPLP fellows focused on a range of impactful topics, such as opposing the closing of the US Department of Education, backing programs that provide funding for student meals and continuing financial support for PELL Grants and special-education programming.

Through the national program, education professionals attend five three-hour Zoom meetings and travel to Washington, D.C., for a symposium. In addition, collaborative groups among the AEPLP fellows work together to develop a written policy analysis and oral presentation.

Individuals interested in joining the EPLP for 2025-26 began applying in May with applications closing in mid-June. For more information about the application process, contact Tyson Elbert, tyson@advocacybuild.com and 202-550-4868 or Dr. Kenny Southwick, ksouthwick@csdgkc.org and 816-803-4301.

CSDGKC supports districts through legislative advocacy and valuable updates

The 2025 General Assembly included a number of detrimental legislative efforts with CSDGKC continuing to support advocacy and provide informative updates throughout the five-month session.

In addition, CSDGKC staff again worked with superintendents to develop a legislative platform and agendas during fall 2024. These serve as a concise and straightforward guide to give to Missouri representatives and senators. They are also designed to be shared with each district's stakeholders so they can better advocate to their elected officials.

CSDGKC's long-time legislative liaison, Steve Carroll, served as Cooperating School Districts' advocate in Jefferson City during the 2025 term. In addition, he continued to create a weekly report for our member districts during the session while also being available to answer questions from superintendents.

Mr. Carroll also shared his insights at three annual CSDGKC meetings including a preview of anticipated legislation in the fall and a summary of the General Assembly session during June, along with another meeting during the session. His expertise is especially valuable and includes his perspectives and insights based on his 10 years as a Missouri House of Representatives member and his 30 years serving various organizations as legislative liaison.



★ ADVOCACY ★

Newest member of Cooperating School Districts takes our organization to 35 school districts

With the addition of the Lawson School District, Cooperating School Districts has grown to a total of 35 member districts, all working together to strengthen the educational community.

Lawson's decision to join the organization was driven by a commitment to enhancing both opportunities and resources for students and staff members, said Dr. Michael Stephenson, the district's superintendent.

"CSD benefits Lawson and the Greater Kansas City area by allowing school districts opportunities to learn from others, advocating for our students at the state and federal level, fostering professional growth opportunities for our teachers and administrators and strengthening community connections," Dr. Stephenson said.

Collaborating with other districts and their leaders is an additional benefit of CSDGKC membership.

"Our affiliation with the CSD allows us to network beyond the borders of our local school district with a regional organization made up of exceptional school districts that have student success as the target for the future growth of our region," he added.

Cooperating School Districts currently represents more than 180,000 students and 30,000 school district employees in rural, suburban and urban communities from 13 Missouri counties.



CSD Retirement Trust offers strong performance, added services and low fees

Improving retirement planning and outcomes while reducing employees' costs are the goals of the CSD Retirement Trust, which stands at 68 participating school districts in 2024. The Trust's geographic boundaries encompass districts from Missouri, Wisconsin, Kansas and North Dakota. The ten 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 services that assist a participant with total financial wellness support. Got Zoom and Savvi continue to provide participants with student loan debt management and repayment solutions. Beginning in September, the Trust began a campaign to encourage districts to take advantage of the benefits offered by Best Money Moves. Reflecting the Trust's commitment to financial education and literacy, the subscription service offers a comprehensive web-based suite of tools to assist all employees, not just Trust participants, make smarter financial decisions unique to their individual circumstances. Got Zoom, Savvi and Best Money Moves are value-added services offered at no cost to districts or participants.



Growth continued in 2024, with the Trust serving more than 10,250 participants with over \$293 million in total plan assets. In 2024 CBIZ, the Trust's financial advisory firm, launched a new proprietary scoring system and evaluation methodology that attempt to quantify the qualitative aspects of investment managers. CBIZ IQ™ not only scores funds on traditional factors of performance and risk, qualitative factors are now incorporated into the scores, giving a more holistic picture of potential long-term investment success without sole reliance on past performance data. Using CBIZ IQ™ the Trust's investment options continue to show solid performance when compared against Morningstar category peers.

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. The Trust's annual headcount fee remained at \$10 per annum, and total basis points remained at 21 bps. Since the launch of the Trust in 2010, total investment management fees for an individual have been systematically reduced, bringing significant cost savings to investors.

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

For more information about the CSD 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@csdgkc.org.

CSDGKC 2024-25 BOARD

Dr. Kenny Rodriquez

CSDGKC Board President
Superintendent, Grandview C-4
Schools

Ms. Rhonda Gilstrap

CSDGKC Board Vice President
Board Member, Blue Springs School
District

Ms. Kathy Butler

CSDGKC President-Elect
Superintendent, Lone Jack C-6
School District

Dr. Rochel Daniels

CSDGKC Board Secretary/Treasurer
Superintendent, North Kansas City
Schools

Dr. Jeremy Tucker

CSDGKC Board Past President
Superintendent, Liberty Public
Schools

Dr. Josh Chastain

– appointed 3/12/25

CSDGKC Director
Superintendent, Harrisonville School
District

Ms. Jill Esry

CSDGKC Director
Board Member, Independence School
District

Mr. Tray Harkins

CSDGKC Director
Board Member, Excelsior Springs
School District

Dr. Jason Snodgrass

CSDGKC Director
Superintendent, Fort Osage R-1
School District

CSDGKC LEADERSHIP

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Associate and affiliate members help support CSDGKC and keep dues at the same rate for 18 years

Affiliate and associate memberships in CSDGKC are a way for organizations and businesses to support our mission and goals. Thanks to revenue from these memberships, Cooperating School Districts has been able to keep dues at just \$2 per student since 2007 for district members.

Associate memberships are available to educational organizations and institutions with affiliate memberships offered to business organizations and vendors. These memberships help the organizations make connections with our 35 member districts so they can better support, work with and seek business relationships with CSDGKC members.

While Cooperating School Districts cannot endorse these affiliate and associate members, we continue to be grateful for their involvement in CSDGKC and their ongoing support for public education in our area.

Annual audits result in a decade of positive reports for CSDGKC

One of the steps Cooperating School Districts of Greater Kansas City takes to ensure accountability and fiscal transparency is contracting with an outside agency for an annual audit. For the 10th year in a row, CSDGKC earned a clean report from Marr and Company, P.C., of Kansas City.

The comprehensive 2023-24 audit covered CSDGKC's finances, fiscal practices and procedures. This review helps Cooperating School Districts make sure the organization is using best practices in this area and making wise use of its resources.

After the audit is completed, the CSDGKC Board of Directors thoroughly review the results. To stay updated throughout the year, the Board members also receive the organization's monthly financial statements as well as information related to any changes to CSD's overall finances and practices.

Members of CSDGKC

FULL MEMBERS OF CSDGKC

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

MOCAAT MEMBERS

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

PDN-ONLY MEMBERS

Academy for Integrated Arts
St. Therese

SIPGKC MEMBERS

Blue Springs
Fort Osage
Grain Valley
Platte County
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
Western Governors University -
Missouri

AFFILIATE MEMBERS

Gold Membership
ConvergeOne
CSD Retirement Trust
EdCounsel, LLC
Guin Mundorf, LLC
JE Dunn
MOCAAT
Newkirk Novak
Self-Insurance Pool of
Greater Kansas City

Silver Membership

American Fidelity
Hollis+Miller
k12itc
McCownGordon

Bronze Membership

BlueCross BlueShield of Kansas City
CBIZ
Edmentum
Security Benefit
Spencer Fane
Trane Technologies



MOCAAT eclipsed the \$3 billion threshold for total funds under management in 2024

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 4+ years, it is evident that school districts were looking for additional options.

Currently there are more than 250 school districts and other political subdivisions that have passed the resolution to become a member of MOCAAT. Of the 250+ member districts, more than 200 have made an investment within MOCAAT. There are additional school districts that have passed the resolution or are planning to pass the resolution soon. MOCAAT is currently on pace reach or eclipse the 300 members mark in the 2025-2026 school year.

MOCAAT eclipsed the \$3 billion threshold for total funds under management in 2024 and ended the calendar year with \$2.8 billion in total assets. After a very successful property tax season of the first quarter of 2025, the fund ended February with \$3.75 billion in funds under management.



MOCAAT offers a wide range of tools and services for Missouri schools, including:

- Competitive Liquid Investment Options
- Term Series and Long-Term Duration Products
- Customized Online Reporting & Transactions
- Cash Flow Management
- Bond Proceeds Management
- 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. With the rapid growth of the fund since these two leaders joined, the MOCAAT team has grown significantly by adding the following team members: Paul Ziegler, Emily Kelso, Wes Karsten, Megan Foster and Carson Buechele. This team actively supports the 250+ Missouri members with all things related to investment planning and execution.

The positive impact of MOCAAT continues to spread, as other municipalities are regularly reaching out for investment help. We now serve library districts, fire districts, ambulance districts, cities, and other political subdivisions across the state.

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).