



2020-21 STRATEGIC BASED BUDGET AND STAFFING PLANNING CALENDAR



“Budget and staffing with a focus on Strategic Based Budget”

Every step of the 2020-21 budget process needs to support the Mission and Vision Statements. Specifically, drivers of the budget are:

- All students surpass their annual academic growth targets and graduate ready for success.
- Proactively recruit, retain, and engage talent that reflects and is responsive to our diverse community.
- Excel in how we serve all stakeholders and build relationships with families, community members, and businesses that promote positive outcomes for students.
- Use district resources effectively and efficiently.
- Facilities and services meet the needs of our diverse and growing student population and community.
- Measures of operational effectiveness by department.

Each discussion on the budget should begin and end with the questions, “How will this decision prepare every child, every day to become a better student?” and “How will this decision help our district be the district of choice?”

By asking those questions and keeping focused on the District’s Strategic Plan we will continue to move the district forward on the journey of Strategic Based Budgeting.

JANUARY 2019

January 30

- Complete the 2020-21 Budget and Staffing calendar and incorporate it into the district Strategic Planning Calendar for 2020-21.

SEPTEMBER 2019

September 12

- Director of Business and Finance (DBF) and Director of Human Resources (DHR) present the Budget and Staffing Calendar to Senior Leadership Team (SL Budget Team).

September 26

- SL Budget Team and DBF will meet and begin to establish the 2020-21 budget objectives for the district. These objectives or principles will guide the preliminary budget development process for 2020-21. The four pillars of the School Board approved Strategic Plan will be the focus for the 2020-21 budget objectives. Focus will be on finalizing the budget calendar, discussing restoration of 2020-21 budgets including fund balance, and begin discussing 2020-21 new strategic programs.

OCTOBER 2019

October 1

- FTE (Teacher and Support Staff) confirmation meeting with elementary principals.
- FTE (Teacher and Support Staff) confirmation meetings with secondary principals.
- Review and, if necessary, develop recommendations for changes to staffing process and calendar.

October 9

- SL Budget Team and DBF discuss and plan for the district's 2020-21 budget priorities. These priorities or objectives will guide the budget development process for 2020-21. The four pillars of the School Board approved Strategic Plan will be the focus for the 2020-21 budget priorities. Focus on determining enrollment input, revenue cap input and state aid; discuss baseline for new staffing.
- SL Budget Team reviews Forecast 5 Key Statistics Data with DBF (lead) and DHR.
- DHR, DBF, and SLT will develop staffing formulas and/or ratios.
- HR processes and develops FTE staffing plan documents.

October 10-11

- The DBF, DHR and Assistant Superintendent of Operations (ASO) attend the National Forecast 5 conference in IL.

October 17

- DBF and DHR present the Budget and Staffing Calendars to Cabinet.

October 24

- SL Budget Team and DBF discuss and plan for the district's 2020-21 budget priorities. These priorities or objectives will guide the budget development process for 2020-21. The four pillars of the School Board approved Strategic Plan will be the focus for the 2020-21 budget priorities. Focus on confirming staffing, discussing salary and benefits inputs.
- SL Budget Team reviews Forecast 5 Open Enrollment Data with DBF (lead) and DHR.

NOVEMBER 2019

November 7

- SL Budget Team reviews Forecast 5 Key Staffing Ratios with DHR (lead) and DBF.
- SL Budget Team reviews Forecast 5 Key Outlier report with DBF (lead).

DECEMBER 2019

December 2

- **UW-APL presents updated enrollment projections for Board and public.**
- **Administration discusses parameters with Board for 2020-21 budget "Big Rocks" meeting.**

December 5

- SL Budget Team review of R.W. Baird 20-21 Budget Plan 1.0, determine gap; begin discussion on district-wide budget reallocations (i.e., benefits, early retirement, etc.).
- SL Budget Team and DBF develop steps for budget reallocation plans.

December 13

- Leadership Collaborative reviews budget forecast model and begins work on reallocation list, if needed.

December 19

- SL Budget Team Budget team review R.W. Baird 2020-21 Budget Plan 2.0, determine gap; implement action for school and department based budget reallocations planning. **(5 hours)**
- DHR, DBF and SLT will develop staffing formulas and/or ratios.

December 30

- Budget manual completed. District departments will use strategic-based budgeting, and schools will use a strategic based budgeting process.
- DBF will have the major components of the revenue budget completed.

December

- ASO and Director of Facilities & Grounds work with principals to determine summer maintenance projects.
- Superintendent, ASO, DBF meet with school staff to discuss the district budget.

JANUARY 2020

January 8

- Departments and schools begin building their itemized budgets to align with the Strategic Plan.
- SL Budget Team Budget Meeting.
- DBF runs Infinite Campus and enrollment projection report and sends updated numbers to DHR to process.
- DBF meets with new administrators to discuss the budget process.

January 10

- 2020-21 staffing projections emailed to elementary principals.

January 17

- Leadership Collaborative budget workshop, if needed.
- Leadership Collaborative review draft of employee survey on budget if applicable.
- Leadership Collaborative review key Forecast 5 data.

January 20

- Handbook committees review preliminary reallocation list, if needed.
- Tentative date to send out employee survey on budget reallocation.

January 27

- **School Board authorizes preliminary notice of non-renewal of administrators; authorization of administrator contract extensions, renewals and non-renewals; and approval of administrator contract template.**
- **Board reviews the budget calendar and sets the Annual Meeting date.**

January 28

- Elementary principals submit 2020-21 staffing requests/adjustments for additional staffing to DHR.
- Elementary Staff preparation meeting.

January 30

- SL Budget Team Meeting.

January TBD

- Schools and departments continue work on budget reallocations plans.
- **Administration/School Board follows state budget issues.**
- Superintendent, ASO, and DBF meet with school staff to discuss the district budget.

FEBRUARY 2020

February 3

- Staffing plan documents sent to secondary principals.
- Elementary staff preparation meeting.

February 6

- DHR and DBF meet leadership to discuss projections, requests and updates to elementary staffing FTE.
- Leadership team discuss elementary projections, requests, and updates of staffing FTE.
- Cabinet review of preliminary reallocation list.

February 10

- **SL Budget Team meets with Board on preliminary budget reallocation list; closed session, if needed.**
- **Final notice of Administrative certified personnel non-renewal at School Board meeting.**

February 12

- SL Budget Team review of staff survey data.
- SL Budget Team continues work on reallocation list.

February 14

- Initial meeting with elementary principals to discuss projections, requests, and updates of staffing FTE.
- Leadership Collaborative works on budget (AM meeting).

February 20

- DBF has entered into Skyward the administrator and admin support salary and benefits.
- LC reviews preliminary budget reallocation list.
- Touch base meeting with leadership to discuss elementary staffing.

February 24

- Secondary principals submit 2020-21 staffing updates/changes to HR.
- **School Board reviews budget forecast modeling.**
- **Administration discusses with Board strategy for 2018-19 unallocated budget dollars.**

February 25

- Follow-up meeting with elementary team to discuss projections, requests, and updates of staffing FTE.

February 26

- SL Budget meeting, review of R.W. Baird 2020-21 Budget Plan 3.0 (after implementation of school/department reallocation plans).

February 28

- Deadline to enter building and program budgets built with strategic-based budgeting into Skyward.
- DBF will be able to input any revisions to staffing into the 2020-21 budget.
- All non-staffing and all non-building based budgets are entered in Skyward by the Business Office.
- A final reallocation plan by each area will need to be submitted to the DBF.
- DHR and DBF meet with leadership to discuss secondary level FTE projections, requests, and updates.
- DBF will review all non-staffing and non-building based budgets and make necessary adjustments.
- Schools and departments finish budget reallocation plans; submission deadline is February 28.

February

- **Administration/School Board follows state budget issues.**
- Superintendent, ASO, and DBF meet with school staff to discuss the district budget.

MARCH 2020

March 1

- Meeting with the Director of Student Services to discuss preliminary staffing for Special Education.

March 3

- Secondary Staff Preparation meeting with leaders.

March 6

- Initial meeting with secondary principals to discuss projections, requests, and updates of staffing FTE.
- Principals submit preliminary list of non-renewals for professional educators to HR.
- DBF runs Skyward 3 year budget analysis to determine Skyward 1st draft budget.

March 9

- **School Board authorizes preliminary notice of non-renewals for professional educators.**

March 12

- Touch-base meeting with leadership to discuss elementary staffing at cabinet.
- SL Budget Team Budget review meeting.

March 16

- School Board authorizes preliminary notice of non-renewals for professional educators.
- Follow-up meeting with elementary principals to discuss staffing.

March 17

- Follow-up meeting with secondary principals to discuss staffing.

March 18

- SL Budget Team and DBF review the current draft of the budget and determine the next step(s) to take with the budget. Notification to schools and departments is given if budget reallocation plans need to be implemented.

March 19

- The Operations team has reviewed TLE planned expenses over \$50,000 or any new budget initiative over \$10,000.
- The TLE team has reviewed Operations planned expenses over \$50,000 or any new budget initiative over \$10,000.
- Superintendent provides staffing updates to Leadership Collaborative and discusses necessary FTE changes/updates with job-alike groups.
- Touch base meeting with leadership to discuss secondary staffing at Cabinet.
- DBF to run 2-year budget analysis to produce 2nd Skyward budget.

March 23

- **School Board takes action on budget reallocation list, if needed.**
- DBF has entered into Skyward the professional educator salary and benefits including changes in FTE.

March 30

- DHR and DBF meet with leadership to discuss new/additional staffing requests and transfer process.

March 31

- Follow-up meeting with secondary principals to discuss staffing updates.

- Principals submit recommendations for final non-renewal of professional educators to HR.

March

- Superintendent, ASO, and DBF meet with school staff to discuss the district budget.
- **Administration/School Board follows state budget issues.**

APRIL 2020

April 1

- Meeting with the Director of Student Services to discuss final staffing for Special Education.

April 8

- SL Budget Team Budget review meeting.

April 9

- Meeting with leadership to discuss general staffing updates.

April 12

- DBF has entered into Skyward the Support Staff salary and benefits including changes in FTE.

April 13

- **School Board authorizes final notice of non-renewal of professional educators, approval of contract template and issuance of professional educators contracts for 2020-21.**

April 15

- Buildings and departments have implemented the budget reallocation plan, if needed.

April 22

- SL Budget Team Budget review meeting.

April 27

- **School Board reviews Master Facility Plan. Open for community input.**

April 30

- Professional educator contracts due to Human Resources.

April

- Superintendent, ASO, and DBF meet with school staff to discuss the district budget, if needed.
- **Administration/School Board follows state budget issues.**

MAY 2020

May 4

- Leadership to discuss transfer process and communication plan with principals at job alike.
- Identify sections that are probable moves/recalls.

May 6

- **New School Board members meet with DBF for in-service on the budgeting process (if applicable).**
- SL Budget Meeting.

May 7

- Job alike touch base meeting with elementary principals to discuss staffing, transfers and communication plan.
- Discussion on placement of Open Enrollment applicants.
- Staffing-Section update meeting with leadership.

May 21

- Email update to principals on necessary staffing changes/updates.
- Principals notify professional educators of transfer process.

- Staffing-Section update meeting with leadership.

May 26

- **Overview of budget inputs to the School Board. Open for community input.**
- **School Nutrition budget presented to the School Board. Open for community input.**
- **Superintendent, Assistant Superintendents, DHR, and DBF discuss salary and benefit budget inputs with the Board in closed session.**

May

- Superintendent, ASO, and DBF meet with school staff to discuss the district budget.
- **Administration/School Board follows state budget issues.**

JUNE 2020

June 9

- Staffing-Section update meeting with leadership.
- Email update to principals on necessary staffing changes/updates.
- Principals notify professional educators of transfer process.

June 22

- **First draft of the budget is presented to the School Board.**

June 23

- Leadership meets to determine section updates and necessary teacher moves.
- Email update to principals on necessary staffing changes/updates.
- Principals determine teacher moves using the transfer process (if necessary) and communicate that moves may be possible in August.

JULY 2020

July 1

- Beginning of 2020-21 fiscal year.
- Equalization aid estimate received from DPI.

July 14

- Leadership meets to determine section updates and necessary teacher moves.
- Email update to principals on necessary staffing changes/updates.
- Principals determine teacher moves using the transfer process (if necessary) and communicate that moves may be possible in August.

July 21

- Leadership meets to determine section updates and necessary teacher moves.

July 26

- Leadership meets to determine section updates and necessary teacher moves.
- DBF updates enrollment sheet.

July 27

- **Public Hearing on the budget held as part of regular Board meeting. Open for community input.**

July 28

- Leadership meets to determine section updates and necessary teacher moves.

AUGUST 2020

August 1

- Elementary principals meet to discuss voluntary placement.

August 4

- Elementary voluntary placement meeting.
- Secondary voluntary placement meeting.

August 6

- Leadership meets to determine section updates and necessary teacher moves.
- DBF updates enrollment sheet.

August 14

- FTE master sheet updated daily
- Leadership meets to determine section updates and necessary teacher moves

August 20

- Leadership meets to determine section updates and necessary teacher moves.

August 24

- **School Board takes action on the Proposed Budget. Open for community input.**

SEPTEMBER 2020

September 25

- Annual Meeting/Budget Hearing booklet is available for public inspection, *WI State Statute 65.90 (3)(a)*. Open for community input.
- First publication of Class I notice listing the Proposed Budget and Annual Meeting in the Sun Prairie newspaper, *The Star*.

September

- School budgets are adjusted based on 3rd Friday student enrollment count.

OCTOBER 2020

October 1

- Department of Revenue certifies equalized valuation.

October 2

- Second publication of Class I notice listing the Proposed Budget and Annual Meeting in the Sun Prairie newspaper, *The Star*.

October 5

- **Annual Meeting and Budget Hearing, *WI State Statute 65.90 (4)*, held at 6:00 p.m. at the Sun Prairie High School PAC pending School Board approval.**
- **Electors vote and set tax levy. Open for community input.**

October 6

- Elementary FTE Confirmation Meetings.

October 9

- Secondary FTE Confirmation Meetings.

October 15

- DPI provides updated information on equalization aid.

October 26

- **School Board adopts Original Budget. Open for community input.**

- **Administration publishes a Class I notice in the Sun Prairie newspaper, *The Star*, of the entire budget within 10 days from the last Board meeting in October.**

NOVEMBER 2020

November 1

- **School District Clerk certifies the tax levy, *WI State Statute 120.12(3)(a)*.**

JANUARY 2021

2nd Board Meeting

- **School Board approves any needed 2nd quarter budget adjustments.**

APRIL 2021

2nd Board Meeting

- **School Board approves any needed 3rd quarter budget adjustments.**

JULY 2021

2nd Board Meeting

- **School Board approves any needed 4th quarter budget adjustments and allocation of conserved funds.**

DECEMBER 2021

2nd Board Meeting

- **School Board reviews and approves the 2020-21 audit.**