



2018-19 STRATEGIC BASED BUDGET AND STAFFING PLANNING CALENDAR

*"Building on past budget and staffing success with
a focus on Strategic Based Budgeting"*



Every step of the 2018-19 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 focusing on the District's Strategic Plan, the district will continue to move forward on the journey of Strategic Based Budgeting.

SEPTEMBER

September 13

- 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 27

- SL Budget Team and DBF meet and begin to establish the 2018-19 budget objectives for the district. These objectives or principles guide the budget development process for 2018-19. The four pillars of the School Board approved Strategic Plan are the focus for the 2018-19 budget objectives. Focus on finalizing budget calendar, discuss restoration of 2018-19 budgets including fund balance, and begin discussing 2018-19 new strategic programs.

September 29

- 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.



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OCTOBER

Oct. 11

- SL Budget Team and DBF meet and establish the 2018-19 budget objectives for the district. These objectives or principles guide the budget development process for 2018-19. The four pillars of the School Board approved Strategic Plan are the focus for the 2018-19 budget objectives. 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 develop a staffing formulas and/or ratios.
- HR processes and develops FTE staffing plan document.

October 12

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

October 25

- SL Budget Team and DBF meet and establish the 2018-19 budget objectives for the district. These objectives or principles guide the budget development process for 2018-19. The four pillars of the School Board approved Strategic Plan are the focus for the 2018-19 budget objectives; focus on confirm staffing, discuss salary and benefits inputs.
- SL Budget Team reviews Forecast 5 Open Enrollment Data with DBF (lead) and DHR.

October 26-27

- The DBF and Supt. of Ops attend the National Forecast 5 conference in Downers Grove, IL.

NOVEMBER

November 8

- 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).

November 9

- DBF presents budget process to Leadership Collaborative.

November 22

- SL Budget Team reviews RW Baird 18-19 Budget Plan 1.0, determines gap; begins discussion on district-wide budget reallocations; i.e., benefits, early retirement, etc.
- SL Budget Team and DBF develops steps for budget reallocation plans.



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November 30

- DBF has the major components of the revenue budget completed.
- Cabinet reviews long-range budget forecast.
- Leadership Collaborative reviews long-range budget forecast.

DECEMBER

December 6

- SL Budget Team reviews RW Baird 2018-19 Budget Plan 2.0, determines gap; implements action for school and department based budget reallocations planning.

December 13

- DHR, DBF and SLT develops staffing formulas and/or ratios.

December 20

- SL Budget Team reviews Forecast 5 Key Staffing Ratios with DHR (lead) and DBF
- Implement action for school and department based budget reallocations planning.

December 21

- Leadership Collaborative begins work on reallocation list.

December 30

- Budget manual is completed. The district departments use zero-based budgeting. The schools use a strategic based budgeting process.

December TBD

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

JANUARY

January 2

- Departments and schools begin building their itemized budgets to align with the Strategic Plan.

January 3

- DBF runs IC and enrollment projection report and sends updated numbers to DHR to process.
- DBF meets with new administrators to discuss budget process (CHUMS).
- SL Budget Team Budget Meeting.

January 8

- 2018-19 staffing projections emailed to elementary principals.



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January 11

- Leadership Collaborative continues to work on reallocation list.
- Leadership Collaborative reviews draft of employee survey on budget if applicable.
- Leadership Collaborative reviews key Forecast 5 data.

January 12

- Elementary Principals, Dir. of Elementary, DBF, and SL Budget Team work on elementary reallocations.

January 15

- Handbook Committees reviews preliminary reallocation list; if needed.
- Tentative date to send out employee survey on budget reallocation.

January 17

- SL Budget Team Budget Meeting.

January 22

- 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 budget calendar and sets Annual Meeting date.

January 24

- Elementary Principals, Dir. of Elementary, DBF, and DHR work on elementary reallocations.
- Secondary Principals, Dir. of Secondary, DBF, and SL Budget Team work of secondary reallocations.

January 30

- Elementary principals submit 2018-19 staffing requests/adjustments for additional staffing to DHR.
- Elementary Staff preparation 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 district budget.



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FEBRUARY

February 1

- Elementary principals submit 2018-19 staffing requests/adjustments for additional staffing to DHR.
- Staffing plan documents sent to secondary principals.
- Elementary staff preparation meeting.

February 8

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

February 9

- Elementary Principals, Dir of Elementary, DBF, LST work on elementary reallocations.
- Secondary Principals, Dir. of Secondary, DBF, SL Budget Team work on secondary reallocations.

February 12

- Initial meeting with elementary principals to discuss projections, requests, and updates of staffing FTE.
- SL Budget Team meets with Board on preliminary budget reallocation list; closed session.
- Final notice of Administrative certified personnel non-renewal at School Board meeting.

February 14

- SL Budget Team reviews RW Baird 2018-19 Budget Plan 3.0 (after implementation of school/departments reallocation plans).
- SL Budget Team reviews staff survey data.
- SL Budget Team continues work on reallocation list.

February 19

- SL Budget Team meets with Board on preliminary budget "big rocks"; closed session.

February 20

- Touch base meeting with leadership to discuss elementary staffing.

February 22

- DBF has entered into Skyward the administrator and admin support salary and benefits.
- LC reviews preliminary budget reallocation list.
- Secondary principals submit 2018-19 staffing updates/changes to HR.



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February 26

- Follow-up meeting with elementary team to discuss projections, requests, and updates of staffing FTE.
- **School Board reviews budget forecast modeling.**

February 28

- Deadline to enter building and program budgets built with zero-based budgeting into Skyward.
- DBF inputs any revisions to staffing into the 2018-19 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 is submitted to the DBF.
- DHR and DBF meet with leadership to discuss secondary level FTE projections, requests, and updates.
- DBF reviews all non-staffing and non-building based budgets and makes necessary adjustments.
- Schools and departments finish work on budget reallocation plans; deadline for submittal is Feb. 28.
- SL Budget Team Budget review meeting.
- Secondary Staff Preparation meeting with Leadership.

February

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

MARCH

March 5

- Initial meeting for secondary principals to discuss projections, requests, and updates of staffing FTE.
- Principals submit preliminary list of non-renewals for teachers to HR.

March 6

- Touch-base meeting with leadership to discuss elementary staffing.

March 9

- Superintendent provides staffing update to Leadership Collaborative and discusses necessary FTE changes/updates with job-alike groups.

March 12

- **School Board authorizes preliminary notice of non-renewals for teachers.**
- Follow-up meeting for elementary principals to discuss staffing updates.



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March 14

- SL Budget Team Budget review meeting.
- Secondary staffing touch base meeting.

March 15

- 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.

March 19

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

March 22

- Update is given to Leadership Collaborative on current budget status.
- Superintendent provides staffing update to Leadership Collaborative and discusses necessary FTE changes/updates with job-alike groups.
- Touch-base meeting with leadership to discuss secondary staffing at cabinet.

March 26

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

March 28

- SL Budget Team Budget review meeting.

March 30

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

March

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



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APRIL

April 2

- Follow-up meeting with secondary principals to discuss staffing updates.
- Principals submit recommendations for final non-renewal of teachers to HR.
- 2018-19 contracts issued to Professional Educators.

April 9

- School Board authorizes final notice of non-renewal of teachers, approval of contract template and issuance of teacher contracts for 2018-19.

April 11

- SL Budget Team Budget review meeting.

April 12

- DBF has entered into Skyward the Support Staff salary and benefits including changes in FTE.
- Meeting with leadership to discuss general staffing updates.

April 15

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

April 28

- SL Budget Team Budget review meeting.

April 24

- School Board reviews long-range budget forecast model. Open for community input.
- School Board reviews Master Facility Plan. Open for community input.

April 26

- Superintendent, ASO, DBF meet with PMMS and RO school staff to discuss district budget.

April 30

- Professional Educator contracts due to Human Resources.

April

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



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MAY

May 3

- Superintendent, ASO, DBF meet with ES school staff to discuss district budget.

May 4

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

May 8

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

May 10

- Superintendent, ASO, DBF meet with CS and NS school staff to discuss district budget.
- Job alike touch base meeting with elementary principals to discuss staffing, transfers and communication plan.
- Discussion on placement of Open Enrolled applicants.
- Staffing-Section update meeting w/leadership.

May 24

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

May 29

- 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 Board in closed session.

May

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



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JUNE

June 7

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

June 21

- 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.

June 26

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

JULY

July 1

- Beginning of 2018-19 fiscal year.
- Equalization aid estimate received from DPI.

July 11

- 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 19

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

July 22

- 2nd draft of the budget is taken to the School Board, using July 1 equalization aid estimate (if needed). Open for community input. (if needed)

July 25

- Public Hearing on the budget held in Room 100 at the District Office and broadcast using the interactive software. Open for community input.

July 26

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



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July 22

- 2nd draft of the budget is taken to the School Board, using July 1 equalization aid estimate (if needed). Open for community input. (if needed)

AUGUST

August 1

- Elementary principals meet to discuss voluntary placement.

August 2

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

August 8

- Elementary voluntary placement meeting.

August 9

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

August 16

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

August 23

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

August 13 or 27

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

SEPTEMBER

September 19

- First publication of Class I notice listing the Proposed Budget and Annual Meeting in the Sun Prairie newspaper, *The Star*.
- Proposed Budget adjustment based on 3rd Friday student enrollment count.

September 23

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



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September

- Annual Meeting/Budget Hearing booklet is available for public inspection, *WI State Statute 65.90 (3)(a)*. Open for community input.



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OCTOBER

October 1

- Department of Revenue certifies equalized valuation.
- Annual Meeting and Budget Hearing, *WI State Statute 65.90 (4)*, held at 6:30 p.m. at the Sun Prairie High School PAC pending School Board approval. (Note: School Board meeting will need to be changed.)
- Electors vote and set tax levy. Open for community input.
- Elementary FTE Confirmation Meetings.

October 3

- Secondary FTE Confirmation Meetings.

October 15

- DPI provides updated information on equalization aid.

October 23 or 30

- 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.

NOVEMBER

November 1

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