



2017-18 STRATEGIC BASED BUDGET AND STAFFING PLANNING CALENDAR



“Building on past budget and staffing success with a focus on new Strategic Based Budgeting ”

Every step of the 2017-18 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 District’s Strategic Plan will move the district forward on the journey of Strategic Based Budgeting.

SEPTEMBER

September 6

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

September 14

- Superintendent, Assistant Superintendent of Operations, (ASO), DBF meet with High School school staff to discuss district budget with focus on referendum.

September 19

- Superintendent, ASO, DBF meet with Prairie Phoenix school staff to discuss district budget with focus on referendum.

September 21

- SLT and DBF will meet and begin to establish the 2017-18 budget objectives for the district. These objectives or principles will guide the budget development process for 2017-18. The four pillars of the School Board approved Strategic Plan will be the focus for the 2017-18 budget objectives. Focus on finalizing budget calendar, discuss restoration of 2016-17 budgets including fund balance and discuss 2017-18 new strategic programs.



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- Superintendent, ASO, DBF meet with CH Bird school staff to discuss district budget with focus on referendum.

September 27

- DHR (lead) and DBF meet with elementary team and administrators to review and if necessary, develop recommendations for changes to staffing allocation formula for elementary level specials (Music, Art, PE, Health).

September 28

- SLT and DBF will meet and establish the 2017-18 budget objectives for the district. These objectives or principles will guide the budget development process for 2017-18. The four pillars of the School Board approved Strategic Plan will be the focus for the 2017-18 budget objectives. Focus on determining enrollment input, revenue cap input and state aid; discuss baseline for new staffing.
- SLT reviews Forecast 5 Key Statistics Data with DBF (lead) and DHR.
- Superintendent, ASO, DBF meet with NS and Horizon school staff to discuss district budget with focus on referendum.

September 29

- DBF presents budget process to Leadership Collaborative.
- DBF and DHR present the Budget and Staffing Calendar to Cabinet.

OCTOBER

October 4

- DHR (lead) and DBF meet with elementary team and administrators to review and if necessary, develop recommendations for changes to staffing allocation formula for elementary level specials (Music, Art, PE, Health).

October 5

- SLT and DBF will meet and establish the 2017-18 budget objectives for the district. These objectives or principles will guide the budget development process for 2017-18. The four pillars of the School Board approved Strategic Plan will be the focus for the 2017-18 budget objectives; focus on confirm staffing, discuss salary and benefits inputs.
- Superintendent, ASO, DBF meet with PVMM and CHUMS staff to discuss district budget with focus on referendum.

October 12

- SLT and DBF will meet and establish the 2017-18 budget objectives for the district. These objectives or principles will guide the budget development process for 2017-18. The four pillars of the School Board approved Strategic Plan will be the focus for the 2017-18 budget objectives; focus on confirmation of all inputs, discuss the brainstormed list of reallocations.



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- SLT reviews Forecast 5 Open Enrollment Data with DBF (lead) and DHR.
- Superintendent, ASO, DBF meet with RO and CS school staff to discuss district budget with focus on referendum.

October 14

- DHR provides current FTE allocations of schools to principals for review and verification.

October 19

- Superintendent, ASO, DBF meet with PMMS and ES school staff to discuss district budget with focus on referendum.

October 21-22

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

October 26

- SLT and DBF will meet and establish the 2017-18 budget objectives for the district. These objectives or principles will guide the budget development process for 2017-18. The four pillars of the School Board approved Strategic Plan will be the focus for the 2017-18 budget objectives; focus on brainstormed list of reallocations.
- SLT reviews Forecast 5 Enrollment Dashboard with DBF (lead) and DHR.
- Superintendent, ASO, DBF meet with WS school staff to discuss district budget with focus on referendum.

October 27

- Leadership Collaborative will go over current staffing in a table top review by levels.

Oct. TBD

- DHR (lead) and DBF meet with secondary team and administrators to review and if necessary, develop recommendations for changes to staffing allocation formula for secondary level.

NOVEMBER

November 2

- SLT review of RW Baird 17-18 Budget Plan 1.0, determine gap; begin discussion on district-wide budget reallocations; i.e., ABP, early retirement, etc.

November 14

- Confirmation of changes/modifications of current FTE allocations due to DHR.

November 16

- SLT and DBF develop guidelines for budget reallocation plans and finalize district-wide reallocations to implement.
- SLT reviews Forecast 5 Key Staffing Ratios with DHR (lead) and DBF.



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November 30

- DBF will have the major components of the revenue budget completed.

November TBD

- Preliminary staffing informational meeting with Principals, Senior Leadership and Administrators.
- Superintendent, ASO, DBF meet with school staff to discuss district budget.
- DHR (lead) and DBF meet with SLT and Elementary team to review and approve recommendations for staffing allocation formula for elementary level specials (Music, Art, PE, Health).
- HR processes and develops FTE staffing plan documents.

DECEMBER

December 1

- Schools and departments begin work on budget reallocation plans; assistance by DBF as needed.

December 2

- Elementary Principals, Dir of Elementary, DBF work on elementary reallocations.
- Secondary Principals, Dir. of Secondary, DBF work of secondary reallocations.

December 5

- Review RW Baird 17-18 Budget Plan 2.0, determine gap; implement action for school and department based budget reallocations planning.

December 12

- SLT reviews Forecast 5 Key Staffing Ratios with DHR (lead) and DBF and review RW Baird 17-18 Budget Plan 2.0, determine gap; implement action for school and department based budget reallocations planning.
- **School Board reviews the Strategic Based Budget and Staffing Planning Calendar. Open for community input.**

December 15

- DBF will present revenue cap worksheet to Leadership Collaborative.

December 16

- Elementary Principals, Dir of Elementary, DBF work on elementary reallocations.
- Secondary Principals, Dir. of Secondary, DBF work of secondary reallocations.

December 19

- SLT reviews Forecast 5 Key Position Control Data with DHR (lead) and DBF.
- DHR (lead) and DBF meet with SLT and secondary team to review and approve recommendations for changes to staffing allocation formula for secondary level.

December 30



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- DHR, DBF, and SLT will develop a staffing formulas and/or ratios using Forecast 5 and other data, and will be based on the current financials impacts for SPASD.
- Budget manual is completed. The district departments will use zero-based budgeting. The schools will 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.
- HR processes and develops FTE staffing plan documents.

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 (Horizon and WS).

January 6

- DHR sends staffing plan documents to elementary principals.
- Elementary Principals, Dir of Elementary, DBF work on elementary reallocations.
- Secondary Principals, Dir. of Secondary, DBF work of secondary reallocations.

January 12

- Leadership Collaborative review key Forecast 5 data.

January 20

- Elementary Principals, Dir of Elementary, DBF work on elementary reallocations.
- Secondary principals, Dir. of Secondary, DBF work of secondary reallocations.

January 23

- School Board authorizes preliminary notice of non-renewal of administrators.
- School Board authorizes administrator contract extensions, renewals and non-renewals.

January 26

- DHR sends staffing plan documents to secondary principals.

January 27

- Elementary Principals, Dir of Elementary, DBF work on elementary reallocations.
- Secondary Principals, Dir. of Secondary, DBF work of secondary reallocations.

January TBD

- Schools and departments continue work on budget reallocations plans.



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

FEBRUARY

February 3

- Elementary principals submit 2017-18 staffing allocation plan with necessary requests for additional staffing to DHR.

February 6

- SLT review of RW Baird 17-18 Budget Plan 3.0 (after implementation of school/department reallocation plans).

February 9

- DHR and DBF meet leadership to discuss projections, requests and updates to elementary staffing FTE.

February 13

- Final notice of administrative certified personnel non-renewal at School Board meeting.

February 16

- DBF presents long-range budget to District Cabinet.
- DBF has entered into Skyward the administrator and admin. support salary and benefits.
- Meeting with leadership and elementary team to discuss projections, requests and updates of staffing FTE.

February 23

- Secondary principals submit 2016-17 staffing allocation plan with necessary requests for additional staffing to DHR.

February 28

- Deadline to enter building and program budgets built with zero-based budgeting into Skyward.
- DHR will have met with all schools to develop a staffing plan based on enrollment projections and the staff formula. Also, the DBF will be able to input any revisions to staffing into the 2017-18 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.



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- DBF will review all non-staffing and non-building based budgets and make necessary adjustments.
- Schools and departments finish work on budget reallocation plans; deadline for submittal is Feb. 28.

February

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

MARCH

March 2

- Meeting with Secondary Principals and Leadership to discuss FTE and staffing allocations.

March 8

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

March 9

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

March 17

- DBF has entered into Skyward the Support Staff salary and benefits including changes in FTE.
- 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.
- Principals submit recommendations for non-renewal of teachers to DHR.

March 20

- Preliminary list of non-renewals shared with Senior Leadership.

March 23

- Update is given to Leadership Collaborative on current budget status.

March 27

- School Board authorizes preliminary notice of non-renewal of teachers.
- Superintendent, Assistant Superintendents, DHR, and DBF discuss salary and benefit budget inputs with Employee Relations Committee.



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March 30

- SLT and DBF review the current draft of the budget and determined 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.

APRIL

April 5

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

April 10

- School Board authorizes final notice of non-renewal of teachers.
- School Board authorizes issuance of teacher contracts for 2016-17.
- School Board review long-range budget forecast model. Open for community input.
- School Nutrition budget presented to the School Board. Open for community input.

April 12

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

April 15

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

April 19

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

April 26

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

April 28

- Professional Educator contracts returned to Human Resources.

April

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

MAY

May 3

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



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May 4

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

May 8

- **School Board reviews Master Facility Plan. Open for community input.**
- **New School Board members meet with DBF for in-service on the budgeting process (if applicable).**
- **Administration/School Board follows state budget issues.**

May 10

- Superintendent, ASO, DBF meet with CS and NS school staff to discuss district budget.

May 30-31

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

May

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

JUNE

June 1-8

- Principals determine teacher moves using the transfer process and communicate that moves may be possible in August.

June 12

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

June 21-22

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

JULY

July 1

- Beginning of 2017-18 fiscal year.
- Equalization aid estimate received from DPI.

July 10

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

July 12-13

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



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July 17

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

July 26-27

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

AUGUST

August 3

- Review and adjust elementary specials based on staffing levels.
- FTE master sheet updated. Leadership meets to determine section updates and necessary teacher moves.

August 8

- Elementary voluntary placement meeting.

August 10

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

August 14

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

August 17

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

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*.

September

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

OCTOBER

October 1

- Department of Revenue certifies equalized valuation.



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October 2

- Possible 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.

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)*.