

# 5-YEAR FINANCE & OPERATIONS AGENDA STRATEGIC PLAN – YEARLY GOALS

Strategic Plan Goal	YEAR 1 2013-2014	YEAR 2 2014-2015	YEAR 3 2015-2016	YEAR 4 2016-2017	YEAR 5 2017-2018	OUTCOME(S)
<b>Employee Benefits</b> <b>Overall Goal:</b> Maintain a competitive and comprehensive benefits package for all staff that attracts and retains the best and brightest in their respective field.	<b>JULY - DECEMBER</b> <ul style="list-style-type: none"> <li>Transform current Insurance Committee into "Benefits Advisory Committee"</li> <li>Select cross-section of District staff for Benefits Advisory Committee (some carryover from Insurance Committee may happen) with term limits</li> <li>Work with Benefits Advisory Committee to establish benefits mission and have Personnel Committee recommend adoption to the Board</li> <li>Personnel Committee shall establish data point benchmarks to continuously monitor and measure competitiveness and comparability</li> </ul>	<b>JULY - DECEMBER</b> <ul style="list-style-type: none"> <li>Review data point benchmarks</li> <li>Conduct employee provider satisfaction survey</li> <li>Explore the relationship between employee wellness and employee benefit programs for full integration and maximization of both programs</li> </ul>	<b>JULY - DECEMBER</b> <ul style="list-style-type: none"> <li>Review data point benchmarks</li> <li>Conduct employee provider satisfaction survey</li> <li>Issue personal annual total compensation statements to all employees</li> </ul>	<b>JULY - DECEMBER</b> <ul style="list-style-type: none"> <li>Review data point benchmarks</li> <li>Conduct employee provider satisfaction survey</li> </ul>	<b>JULY - DECEMBER</b> <ul style="list-style-type: none"> <li>Review data point benchmarks</li> <li>Conduct employee provider satisfaction survey</li> </ul>	Transform the current Insurance Committee into a "Benefits Advisory Committee" and utilize this Committee to inform Personnel Committee and Board of Education decisions on employee benefits.
<b>MEASURES OF SUCCESS</b> <ul style="list-style-type: none"> <li>Successful implementation of Benefits Advisory Committee</li> <li>Benefits mission established</li> <li>Establish and regularly review data point benchmarks to continuously monitor and measure competitiveness and comparability</li> <li>Employee satisfaction rate with providers at 95% or higher</li> <li>Annual health insurance renewals shall be below annual medical trend increases</li> <li>All employees have an established retirement benefit outlined in the <i>Employee Handbook</i> or Board Policy</li> </ul>	<b>JANUARY - JUNE</b> <ul style="list-style-type: none"> <li>Research and consider plan design options for health insurance with Personnel Committee recommendation to Board by May and implementation by October 1</li> <li>Research and consider plan design options for dental insurance with Personnel Committee recommendation to Board by May and implementation by October 1</li> </ul>	<b>JANUARY - JUNE</b> <ul style="list-style-type: none"> <li>Consider plan design options for health insurance to better integrate with wellness programs with Personnel Committee recommendation to Board by May and implementation by October 1</li> <li>Research and consider plan design options for retirement benefits with Personnel Committee recommendation to Board by May and implementation by October 1</li> </ul>	<b>JANUARY - JUNE</b> <ul style="list-style-type: none"> <li>Research and consider plan design options for sick leave, short-term disability, long-term disability and life insurance with Personnel Committee recommendation to Board by May and implementation by October 1</li> </ul>	<b>JANUARY - JUNE</b> <ul style="list-style-type: none"> <li>Research and consider non-traditional benefits with Personnel Committee recommendation to Board by May and implementation by October 1</li> </ul>	<b>JANUARY - JUNE</b> <ul style="list-style-type: none"> <li>Consider possible updates/changes to health and dental insurances based on data points and employee provider satisfaction surveys</li> </ul>	Collaboratively establish a benefits mission agreed upon by the Board of Education, Administration, and a cross-section of District staff.  Research and consider non-traditional benefits to distinguish the District from other employers during the recruitment process and to retain staff.  Research and consider plan design options for the traditional benefits (health, dental, life, long term disability, etc.) that offer the employee competitive and comprehensive coverage while allowing the District to utilize its financial resources in the most efficient manner possible.  Design the benefit package to remain compliant with state and federal regulations, taking advantage of possible cost saving measures available to the District while considering the impact to the employee.  Explore the relationship between employee wellness and employee benefit programs.  Develop a retirement benefit package that is beneficial to both the employee and the District.

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<b>Employee Wellness</b> <u>Overall Goal:</u> Create a culture and environment that supports all District staff and their dependents in focusing on their personal health and well-being.	<b>JULY - DECEMBER</b> <ul style="list-style-type: none"> <li>Transform current Student Nutrition &amp; Wellness Committee into "District Wellness Committee" that focuses on student and employee nutrition and wellness</li> <li>Establish data point benchmarks to continuously monitor and measure employee wellness and participation</li> <li>Explore and establish annual wellness programs throughout the District that are beneficial to both the employee and the District (this may include programs through Associated Financial Group)</li> </ul>	<b>JULY - DECEMBER</b> <ul style="list-style-type: none"> <li>Review data point benchmarks</li> <li>Conduct wellness programming</li> <li>Explore the relationship between employee wellness and employee benefit programs for full integration and maximization of both programs</li> <li>Research and consider best practices in wellness from other employers</li> </ul>	<b>JULY - DECEMBER</b> <ul style="list-style-type: none"> <li>Review data point benchmarks</li> <li>Conduct wellness programming</li> </ul>	<b>JULY - DECEMBER</b> <ul style="list-style-type: none"> <li>Review data point benchmarks</li> <li>Conduct wellness programming</li> </ul>	<b>JULY - DECEMBER</b> <ul style="list-style-type: none"> <li>Review data point benchmarks</li> <li>Conduct wellness programming</li> </ul>	Transform the current Student Nutrition & Wellness Committee into a "District Wellness Committee" that focuses on student and employee nutrition and wellness.  Utilize this Committee to establish wellness programs throughout the District.  Create staff wellness programs that are beneficial to both the employee and the District.  Further develop partnerships with community based businesses and organizations to assist the District in developing and implementing District wellness programs.
<b>MEASURES OF SUCCESS</b> <ul style="list-style-type: none"> <li>Participation of 95% or higher of all covered individuals in health risk assessments and/or other established wellness programs</li> <li>Employee participation of 50% or higher in health plan sponsored wellness reimbursement programs</li> <li>Establish and regularly review data point benchmarks to continuously monitor and measure employee wellness and participation</li> </ul>	<b>JANUARY - JUNE</b> <ul style="list-style-type: none"> <li>Seek community partnerships to better establish employee wellness program for next year</li> <li>Conduct health risk assessments and biometrics</li> </ul>	<b>JANUARY - JUNE</b> <ul style="list-style-type: none"> <li>Conduct wellness programming</li> <li>Consider plan design options for health insurance to better integrate with wellness programs with Personnel Committee recommendation to Board by May and implementation by October 1</li> <li>Conduct health risk assessments and biometrics</li> </ul>	<b>JANUARY - JUNE</b> <ul style="list-style-type: none"> <li>Conduct health risk assessments and biometrics</li> <li>Conduct wellness programming</li> </ul>	<b>JANUARY - JUNE</b> <ul style="list-style-type: none"> <li>Conduct health risk assessments and biometrics</li> <li>Conduct wellness programming</li> </ul>	<b>JANUARY - JUNE</b> <ul style="list-style-type: none"> <li>Conduct health risk assessments and biometrics</li> <li>Conduct wellness programming</li> </ul>	

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<b>Human Resources Operations</b> <b>Overall Goal:</b> Enhance the human resources operations of the District to provide a more comprehensive and efficient employment experience.	<b>JULY - DECEMBER</b> <ul style="list-style-type: none"> <li>Collaborative study to establish new evaluation models that align with state, federal and District requirements</li> </ul> <b>JANUARY - JUNE</b> <ul style="list-style-type: none"> <li>Finalize new evaluation models that align with state, federal and District requirements and make recommendation to the Board's Personnel Committee at the April, 2014 meeting</li> <li>Study human resources duties, processes, and staffing with recommendations to the Board in Fall, 2014</li> </ul>	<b>JULY - DECEMBER</b> <ul style="list-style-type: none"> <li>Implement new evaluation models</li> <li>Finalize all job descriptions and establish a review cycle and process to regularly update them</li> <li>Collaborative study to establish new understandable, accountable, and sustainable compensation models</li> <li>Finalize study of human resources duties, processes, and staffing and present recommendations to the Board</li> <li>Implement human resources study recommendations as possible</li> </ul> <b>JANUARY - JUNE</b> <ul style="list-style-type: none"> <li>Finalize all job descriptions along with a review cycle and process to regularly update them</li> <li>Finalize new understandable, accountable, and sustainable compensation models to be implemented in July, 2015</li> <li>Implement recommendations of the human resources study</li> </ul>	<b>JULY - DECEMBER</b> <ul style="list-style-type: none"> <li>Review and adjust evaluation models based on usage during the 2015-16 school year</li> <li>Develop formal written hiring and recruitment procedures and processes (including subs &amp; volunteers)</li> <li>Develop new hire induction processes for ALL employees (including subs &amp; volunteers)</li> </ul> <b>JANUARY - JUNE</b> <ul style="list-style-type: none"> <li>Implement new evaluation models</li> <li>Develop formal written hiring and recruitment procedures and processes to be used during the 2016 hiring season (including subs &amp; volunteers)</li> <li>Develop new hire induction processes for ALL employees to be used in the August, 2016 induction of all new employees (including subs &amp; volunteers)</li> </ul>	<b>JULY - DECEMBER</b> <ul style="list-style-type: none"> <li>Review and adjust hiring and recruitment procedures and processes as well as new hire induction processes based on performance during the 2016 hiring and induction season (including subs &amp; volunteers)</li> <li>Develop formal written annual process for employee renewal (including subs &amp; volunteers)</li> </ul> <b>JANUARY - JUNE</b> <ul style="list-style-type: none"> <li>Develop formal written annual process for employee renewal with implementation in August, 2017 (including subs &amp; volunteers)</li> </ul>	<b>JULY - DECEMBER</b> <ul style="list-style-type: none"> <li>Review and adjust annual process for employee renewal based on the process' performance during August, 2017 renewal (including subs &amp; volunteers)</li> <li>Ensure all documents for each position in the District is aligned to ensure continuity throughout all human resources processes</li> <li>Develop human resources library of digital files and video resources to be available to all staff in August, 2018</li> </ul> <b>JANUARY - JUNE</b> <ul style="list-style-type: none"> <li>Finalize and prepare for launch of human resources library of digital files and video resources to all staff in August, 2018</li> <li>Finalize all documents for each position in the District to align and ensure continuity throughout all human resources processes</li> </ul>	<p>Provide for a seamless induction of all new staff into the learning community.</p> <p>Further develop a new hire induction process that incorporates all necessary information from each District department and the respective school(s).</p> <p>Develop and formalize an annual process that gathers pertinent employee information for the District and gives the employee the information they need to fulfill their human resources needs.</p> <p>Finalize all job descriptions and collaboratively establish new evaluation models to align with state, federal and District requirements.</p> <p>Establish a cycle and process to review and update job descriptions.</p>
<b>MEASURES OF SUCCESS</b> <ul style="list-style-type: none"> <li>Complete a study of human resources duties, processes and staffing to increase the efficiency and effectiveness of operations and implement the study's recommendations</li> <li>Job descriptions and evaluation systems will be finalized and implemented with an established review cycle outlined</li> <li>Formal written hiring procedures and processes will be established</li> <li>Formal written new hire induction process will be established</li> <li>Formal written annual process for employee renewal will be established</li> <li>All documents (including hiring postings, job descriptions, evaluations, duties, etc.) for each position in the District shall be aligned to ensure continuity throughout all human resources processes.</li> <li>Consider the inclusion of substitutes and volunteers in all human resources processes</li> <li>A library of human resources digital files and video resources shall be available to all staff</li> </ul>						

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Strategic Plan Goal	YEAR 1 2013-2014	YEAR 2 2014-2015	YEAR 3 2015-2016	YEAR 4 2016-2017	YEAR 5 2017-2018	OUTCOME(S)
<b>District Nutrition Programming</b> <b>Overall Goal:</b> Develop and maintain a nutrition program that provides meals that are healthy, nutritious, and appealing while meeting state and federal food service standards and continuing to be fiscally viable.	<b>JULY - DECEMBER</b> <ul style="list-style-type: none"> <li>Research alternative scheduling models to maximize students' meal time as part of overall calendar study &amp; development</li> <li>Establish system to monitor and measure program use and satisfaction, to minimize waste and to maximize catering revenue</li> <li>Train staff on three (3) new "from scratch" menu items</li> <li>Standardize one-sixth of recipes</li> </ul>	<b>JULY - DECEMBER</b> <ul style="list-style-type: none"> <li>Review data points and adjust menus accordingly</li> <li>Train staff on three (3) new "from scratch" menu items</li> <li>Standardize one-sixth of recipes</li> <li>Update equipment inventory on three (3) district buildings</li> <li>Provide a recommendation to the District Administrator and Board regarding alternative scheduling to maximize students' meal time as part of the overall calendar study &amp; development</li> </ul>	<b>JULY - DECEMBER</b> <ul style="list-style-type: none"> <li>Review data points and adjust menus accordingly</li> <li>Train staff on three (3) new "from scratch" menu items</li> <li>Standardize one-sixth of recipes</li> <li>Develop catering program through research of best practices in other districts</li> <li>Explore partnership with High School culinary program (Pro Start)</li> </ul>	<b>JULY - DECEMBER</b> <ul style="list-style-type: none"> <li>Review data points and adjust menus accordingly</li> <li>Train staff on three (3) new "from scratch" menu items</li> <li>Train staff on catering offerings</li> <li>Launch internal advertising campaign for catering opportunities</li> </ul>	<b>JULY - DECEMBER</b> <ul style="list-style-type: none"> <li>Review data points and adjust menus accordingly</li> <li>Train staff on three (3) new "from scratch" menu items</li> <li>Monitor and adjust catering program offerings and marketing program as needed</li> </ul>	Develop working relationships with local/regional providers to procure fresh food items for the school food service program.
<b>MEASURES OF SUCCESS</b> <ul style="list-style-type: none"> <li>Implement "Harvest Item of the Month" into school lunch menus</li> <li>Serve a minimum of three (3) new "from scratch" recipes per year</li> <li>Standardize current recipes</li> <li>An inventory of all food service equipment along with a retirement and replacement schedule will be established</li> <li>Program shall remain self-sufficient</li> <li>Establish a system to monitor and measure District Nutrition Program use and satisfaction, to minimize waste and to maximize catering revenue</li> </ul>	<b>JANUARY - JUNE</b> <ul style="list-style-type: none"> <li>Revisit training on three (3) new "from scratch" menu items</li> <li>Plan "Harvest Items of the Month" for next year</li> <li>Standardize one-sixth of recipes</li> <li>Training staff for quantity food production</li> <li>Provide a recommendation to the District Administrator and Board regarding alternative scheduling to maximize students' meal time at the joint meeting in May as part of overall calendar study &amp; development</li> </ul>	<b>JANUARY - JUNE</b> <ul style="list-style-type: none"> <li>Revisit training on three (3) new "from scratch" menu items</li> <li>Plan "Harvest Items of the Month" for next year</li> <li>Standardize one-sixth of recipes</li> <li>Train staff for quantity food production</li> <li>Update equipment inventory on the other three (3) district buildings</li> <li>Provide recommendations on the retirement and replacement of equipment to the District Administrator and Board by the joint meeting in May</li> </ul>	<b>JANUARY - JUNE</b> <ul style="list-style-type: none"> <li>Revisit training on three (3) new "from scratch" menu items</li> <li>Plan "Harvest Items of the Month" for next year</li> <li>Standardize one-sixth of recipes</li> <li>Train staff for quantity food production</li> <li>Provide finalized catering program materials to the District Administrator and Board by the joint meeting in May</li> </ul>	<b>JANUARY - JUNE</b> <ul style="list-style-type: none"> <li>Revisit training on three (3) new "from scratch" menu items</li> <li>Revisit training on catering offerings</li> <li>Plan "Harvest Items of the Month" for next year</li> <li>Train staff for quantity food production</li> <li>Launch external advertising campaign for catering opportunities</li> </ul>	<b>JANUARY - JUNE</b> <ul style="list-style-type: none"> <li>Revisit training on three (3) new "from scratch" menu items</li> <li>Plan "Harvest Items of the Month" for next year</li> <li>Train staff for quantity food production</li> <li>Monitor and adjust catering program offerings and marketing program as needed</li> </ul>	Become less dependent on pre-made, processed food by increasing the use of "from scratch" menu items.  Provide training to food service staff for quantity food production to promote consistency.  Explore alternative scheduling models to maximize the students' meal time.  Develop a capital equipment plan for the food service department to meet changing nutritional needs, the changing serving needs of staff, and to be able to retire and replace equipment prior to the end of its useful life.  Evaluate and further develop catering offerings to become an established and reliable revenue source for the program.  The program will remain fiscally viable without requiring assistance from the general fund for operations.



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<b>Buildings &amp; Grounds</b> <b>Overall Goal:</b> Develop and maintain a facilities and grounds management program that is recognized as a standard in the industry with a focus on a clean, safe environment while incorporating green energy solutions.	<b>JULY - DECEMBER</b> <ul style="list-style-type: none"> <li>Develop recommendations of all possible green energy projects</li> <li>Continue seeking Energy Star certification for all buildings</li> <li>Consider upgrading at least one (1) piece of buildings &amp; grounds equipment</li> </ul> <b>JANUARY - JUNE</b> <ul style="list-style-type: none"> <li>Conduct feasibility study on all possible green energy projects</li> <li>Continue seeking Energy Star certification for all buildings</li> <li>Consider upgrading at least one (1) piece of buildings &amp; grounds equipment</li> <li>Prepare “Green Report” for Annual Meeting</li> </ul>	<b>JULY - DECEMBER</b> <ul style="list-style-type: none"> <li>Conduct enrollment/community needs study following completion of third Friday count</li> <li>Study available storage space for vehicles, equipment and other District property</li> <li>Consider upgrading at least one (1) piece of buildings &amp; grounds equipment</li> </ul> <b>JANUARY - JUNE</b> <ul style="list-style-type: none"> <li>Develop a formal long range space plan based on results of enrollment/community needs study and storage space study with presentation to the District Administrator and Board by the joint meeting in May</li> <li>Consider upgrading at least one (1) piece of buildings &amp; grounds equipment</li> <li>Prepare “Green Report” for Annual Meeting</li> </ul>	<b>JULY - DECEMBER</b> <ul style="list-style-type: none"> <li>Research a systems management program to better manage records, work orders, etc. and provide analysis tools for the department</li> <li>Consider upgrading at least one (1) piece of buildings &amp; grounds equipment</li> </ul> <b>JANUARY - JUNE</b> <ul style="list-style-type: none"> <li>Recommend systems management program to District Administrator and Board by the joint meeting in May</li> <li>Consider upgrading at least one (1) piece of buildings &amp; grounds equipment</li> <li>Prepare “Green Report” for Annual Meeting</li> </ul>	<b>JULY - DECEMBER</b> <ul style="list-style-type: none"> <li>Implement systems management program</li> <li>Prioritize projects throughout the District utilizing the systems management program</li> <li>Consider upgrading at least one (1) piece of buildings &amp; grounds equipment</li> </ul> <b>JANUARY - JUNE</b> <ul style="list-style-type: none"> <li>Monitor and adjust systems management program</li> <li>Utilize systems management program to develop an inventory of Buildings &amp; Grounds equipment in the District</li> <li>Consider upgrading at least one (1) piece of buildings &amp; grounds equipment</li> <li>Prepare “Green Report” for Annual Meeting</li> </ul>	<b>JULY - DECEMBER</b> <ul style="list-style-type: none"> <li>Monitor and adjust systems management program</li> <li>Consider upgrading at least one (1) piece of buildings &amp; grounds equipment</li> </ul> <b>JANUARY - JUNE</b> <ul style="list-style-type: none"> <li>Consider upgrading at least one (1) piece of buildings &amp; grounds equipment</li> <li>Prepare “Green Report” for Annual Meeting</li> </ul>	<p>Ensure that the District's infrastructure can accommodate the District's ever changing needs.</p> <p>Prioritize projects throughout the District. Improve systems management in the Buildings &amp; Grounds Department for better records and analysis allowing for continual improvement in the program.</p> <p>Develop and implement an enrollment space plan to meet the current and future needs of the District including possible use of vacant property.</p> <p>Upgrade grounds equipment on a regular basis to improve the functions of the grounds management program.</p> <p>Study available storage space for vehicles, equipment and other District property to maximize the District's capital investment.</p> <p>Pursue additional green energy measures and recognitions for all buildings.</p>
<b>MEASURES OF SUCCESS</b> <ul style="list-style-type: none"> <li>Projects will be prioritized and completed based on need</li> <li>A space utilization plan shall be formalized and implemented to meet the District's projected enrollment and operational needs as well as the needs of the community</li> <li>Feasibility study will be completed on all possible green energy measures</li> <li>All schools will be recognized for green energy efforts</li> </ul>						

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<b>Operational Technology</b> <b>Overall Goal:</b> Ensure that all technology supports the academic and operational functions of the District.	<b>JULY - DECEMBER</b> <ul style="list-style-type: none"> <li>Establish system to monitor and measure technology support effectiveness and overall employee satisfaction</li> <li>Update obsolescence plan by December 31 to prepare for budget planning</li> <li>Consider implications of Smarter Balanced Assessment and Educator Effectiveness requirements</li> </ul>	<b>JULY - DECEMBER</b> <ul style="list-style-type: none"> <li>Implement the recommendations of the security study</li> <li>Review data points and adjust program accordingly</li> <li>Update obsolescence plan by December 31 to prepare for budget planning</li> <li>Evaluate the use of a paperless system for Board of Education &amp; Administrative meetings with recommendation by the January joint meeting</li> <li>Consider implications of Smarter Balanced Assessment and Educator Effectiveness requirements</li> <li>Evaluate data systems management procedures</li> </ul>	<b>JULY - DECEMBER</b> <ul style="list-style-type: none"> <li>Review data points and adjust program accordingly</li> <li>Implement research for development of infrastructure for file access, file sharing and use of productivity software to ensure appropriate remote access to district technology resources</li> <li>Update obsolescence plan by December 31 to prepare for budget planning</li> <li>Research a systems management program to better manage records, work orders, etc. and provide analysis tools for the department</li> <li>Conduct Student Information System study</li> </ul>	<b>JULY - DECEMBER</b> <ul style="list-style-type: none"> <li>Implement recommendations of Student Information System study</li> <li>Review data points and adjust program accordingly</li> <li>Update obsolescence plan by December 31 to prepare for budget planning</li> <li>Implement systems management program</li> <li>Prioritize maintenance needs, work orders &amp; major projects throughout the District utilizing the systems management program</li> </ul>	<b>JULY - DECEMBER</b> <ul style="list-style-type: none"> <li>Review data points and adjust program accordingly</li> <li>Utilize systems management program to establish systems to introduce and support new end-user devices ensuring all hardware devices are inventoried, supported and configured to best support end-user needs</li> <li>Update obsolescence plan by December 31 to prepare for budget planning</li> <li>Continue monitoring and adjusting of systems management program</li> </ul>	Continue to make improvements to our technology planning, prioritizing, purchasing and accessibility.  Assure all hardware devices are inventoried, supported and configured to best support end-user needs.  Annually update obsolescence plan in light of changing needs and emerging technologies.  Establish systems to introduce and support new end-user devices.  Further develop infrastructures for file access, file sharing and use of productivity software.  Complete a security study and implement recommendations.  Formulate a plan which oversees all non-curricular software to account for changes and/or upgrades.  Continue to improve Internet and WiFi access.  Expand the utilization of multimedia technologies.  Establish systems to measure technology support effectiveness and overall employee satisfaction.  Evaluate the use of technology and implement solutions where feasible to move towards a paperless system.
<b>MEASURES OF SUCCESS</b> <ul style="list-style-type: none"> <li>Satisfaction survey will be given annually and results shared with all stakeholders</li> <li>Monitoring system using help desk software data will be established to measure technology support effectiveness, the functionality of systems and drive continuous improvements</li> <li>Security study with recommendations will be completed and implemented</li> <li>District obsolescence plan will be updated annually</li> <li>Appropriate secure remote access will be provided to District technology resources</li> <li>Service agreements shall be continually reviewed and monitored for effectiveness and to ensure vendors understand the District's expectations</li> </ul>	<b>JANUARY - JUNE</b> <ul style="list-style-type: none"> <li>Complete a security study with recommendations to District Administrator and Board by the joint meeting in May</li> <li>Review service agreements for the upcoming year</li> <li>Consider implications of Smarter Balanced Assessment and Educator Effectiveness requirements</li> </ul>	<b>JANUARY - JUNE</b> <ul style="list-style-type: none"> <li>Implement the recommendations for use of a paperless system with the Board of Education &amp; Administration as of May 1</li> <li>Review service agreements for the upcoming year</li> <li>Inventory all non-curricular software along with a written plan that accounts for changes and/or upgrades</li> <li>Research &amp; develop infrastructures for file access, file sharing and use of productivity software</li> <li>Implement Smarter Balanced Assessment and Educator Effectiveness requirements</li> <li>Establish data systems management procedures</li> </ul>	<b>JANUARY - JUNE</b> <ul style="list-style-type: none"> <li>Recommend systems management program to District Administrator and Board by the joint meeting in May</li> <li>Review service agreements for the upcoming year</li> <li>Provide recommendations from Student Information System study</li> </ul>	<b>JANUARY - JUNE</b> <ul style="list-style-type: none"> <li>Monitor and adjust systems management program</li> <li>Utilize systems management program to develop an inventory of Technology equipment and infrastructure in the District</li> <li>Review service agreements for the upcoming year</li> </ul>	<b>JANUARY - JUNE</b> <ul style="list-style-type: none"> <li>Ensure equity in technology access across buildings utilizing systems management program data</li> <li>Review service agreements for the upcoming year</li> </ul>	

# 5-YEAR FINANCE & OPERATIONS AGENDA STRATEGIC PLAN – YEARLY GOALS

Strategic Plan Goal	YEAR 1 2013-2014	YEAR 2 2014-2015	YEAR 3 2015-2016	YEAR 4 2016-2017	YEAR 5 2017-2018	OUTCOME(S)
<b>Risk Management / Loss Prevention</b> <b>Overall Goal:</b> Develop and implement a comprehensive risk management program that mitigates the District's exposures to loss and creates an awareness of safe practices and a culture of safety.	<b>JULY - DECEMBER</b> <ul style="list-style-type: none"> <li>Implement the results of the insurance study and RFP process from the spring, 2013</li> <li>Evaluate return to work program and make modifications as necessary</li> <li>Safety Committee shall determine resources needed for "Table Top Exercises" to be conducted annually in at least two buildings</li> </ul>	<b>JULY - DECEMBER</b> <ul style="list-style-type: none"> <li>Evaluate return to work program and make modifications as necessary</li> <li>Safety Committee to develop measurement tool report based on Measures of Success</li> <li>Luther to conduct table top exercise</li> </ul> <b>JANUARY - JUNE</b> <ul style="list-style-type: none"> <li>Measurement tool report to be reviewed semi-annually by Safety Committee</li> </ul>	<b>JULY - DECEMBER</b> <ul style="list-style-type: none"> <li>Evaluate return to work program and make modifications as necessary</li> <li>Measurement tool report to be reviewed semi-annually by Safety Committee</li> <li>Safety Committee to share annual safety report based on prior school year's activity</li> <li>Barrie to conduct table top exercise</li> </ul> <b>JANUARY - JUNE</b> <ul style="list-style-type: none"> <li>Measurement tool report to be reviewed semi-annually by Safety Committee</li> <li>Conduct annual safety survey with results to be incorporated into annual safety report</li> <li>High School to conduct table top exercise</li> <li>Safety Committee shall develop quarterly digital safety newsletter to be launched in August</li> </ul>	<b>JULY - DECEMBER</b> <ul style="list-style-type: none"> <li>Evaluate return to work program and make modifications as necessary</li> <li>Work on a disaster recovery plan with a draft to be shared by the joint Board meeting in May, 2017</li> <li>Measurement tool report to be reviewed semi-annually by Safety Committee</li> <li>Safety Committee to share annual safety report based on prior school year's activity</li> <li>Rockwell to conduct table top exercise</li> </ul> <b>JANUARY - JUNE</b> <ul style="list-style-type: none"> <li>Finalize draft of disaster recovery plan and share by the joint Board meeting in May</li> <li>Measurement tool report to be reviewed semi-annually by Safety Committee</li> <li>Conduct annual safety survey with results to be incorporated into annual safety report</li> <li>Luther to conduct table top exercise</li> </ul>	<b>JULY - DECEMBER</b> <ul style="list-style-type: none"> <li>Evaluate return to work program and make modifications as necessary</li> <li>Implement disaster recovery plan and update by August of each year</li> <li>Measurement tool report to be reviewed semi-annually by Safety Committee</li> <li>Safety Committee to share annual safety report based on prior school year's activity</li> <li>Purdy to conduct table top exercise</li> <li>Independent Insurance Consultant shall evaluate coverage, make recommendations, and conduct RFP process for July 1, 2018 renewals</li> </ul> <b>JANUARY - JUNE</b> <ul style="list-style-type: none"> <li>Measurement tool report to be reviewed semi-annually by Safety Committee</li> <li>Conduct annual safety survey with results to be incorporated into annual safety report</li> <li>Barrie to conduct table top exercise</li> </ul>	<p>The District will work with its insurance carriers, consultants, and vendors to continually decrease the risk of loss and to provide the necessary coverage and services for the District at the lowest possible cost.</p> <p>The District Safety Committee will continue to work on communicating effective practices and developing safe work and learning environments.</p> <p>A disaster recovery plan shall be developed and regularly updated along with regular updates of the District's emergency response plan.</p>
<b>MEASURES OF SUCCESS</b> <ul style="list-style-type: none"> <li>The Safety Committee will utilize loss data, surveys, and other data collection methods to analyze the effectiveness of the safety program and make enhancements where needed</li> <li>Formal written disaster recovery plan will be developed and implemented</li> <li>The disaster recovery plan and the emergency response plan will be updated on a regular basis</li> <li>Maintain a District worker's compensation modification rate of .90 or less (1.00 is average)</li> <li>Zero lost time worker's compensation claims</li> <li>The District's five (5) year worker's compensation loss ratio shall consistently be less than 40%</li> </ul>	<b>JANUARY - JUNE</b> <ul style="list-style-type: none"> <li>Review the performance of the changes from the insurance study and RFP process</li> <li>Safety Committee to develop measurement tool report based on Measures of Success</li> <li>Purdy to conduct table top exercise</li> </ul>					

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Strategic Plan Goal	YEAR 1 2013-2014	YEAR 2 2014-2015	YEAR 3 2015-2016	YEAR 4 2016-2017	YEAR 5 2017-2018	OUTCOME(S)
<b>Business &amp; Financial Operations</b> <u>Overall Goal:</u> Enhance the financial operations of the District to make them more efficient as well as transparent and understandable to all stakeholders.	<b>JULY - DECEMBER</b> <ul style="list-style-type: none"> <li>Compile electronic copies of materials from processes throughout the year</li> </ul> <b>JANUARY - JUNE</b> <ul style="list-style-type: none"> <li>Compile electronic copies of materials from processes throughout the year</li> </ul>	<b>JULY - DECEMBER</b> <ul style="list-style-type: none"> <li>Compile electronic copies of materials from processes throughout the year</li> <li>Study financial processes that can be automated via Skyward</li> </ul> <b>JANUARY - JUNE</b> <ul style="list-style-type: none"> <li>Compile electronic copies of materials from processes throughout the year</li> <li>Recommend and rollout plan/timeline of financial processes to be completed via Skyward</li> </ul>	<b>JULY - DECEMBER</b> <ul style="list-style-type: none"> <li>Compile electronic copies of materials from processes throughout the year</li> <li>Rollout financial processes to be completed via Skyward</li> </ul> <b>JANUARY - JUNE</b> <ul style="list-style-type: none"> <li>Compile electronic copies of materials from processes throughout the year</li> <li>Rollout financial processes to be completed via Skyward</li> </ul>	<b>JULY - DECEMBER</b> <ul style="list-style-type: none"> <li>Formally compile a <i>Business Operations and Procedures Manual</i></li> <li>Develop library of tutorials on business and financial processes</li> <li>Rollout financial processes to be completed via Skyward</li> </ul> <b>JANUARY - JUNE</b> <ul style="list-style-type: none"> <li>Finalize <i>Business Operations and Procedures Manual</i></li> <li>Develop library of tutorials on business and financial processes</li> <li>Rollout financial processes to be completed via Skyward</li> </ul>	<b>JULY - DECEMBER</b> <ul style="list-style-type: none"> <li>Update <i>Business Operations and Procedures Manual</i> as needed</li> <li>Develop library of tutorials on business and financial processes</li> <li>Rollout financial processes to be completed via Skyward</li> </ul> <b>JANUARY - JUNE</b> <ul style="list-style-type: none"> <li>Update <i>Business Operations and Procedures Manual</i> as needed</li> <li>Develop library of tutorials on business and financial processes</li> </ul>	<p>Effectively communicate with stakeholders regarding the rationale for processes and procedures used in the business and financial operations of the District to allow for greater understanding of necessary requirements.</p> <p>Streamline the processes and procedures to maximize efficiency by leveraging all available technological resources.</p> <p>Publish a “Business Operations and Procedures Manual” that outlines all business processes in an understandable manner.</p>
<b>MEASURES OF SUCCESS</b> <ul style="list-style-type: none"> <li>A Business Operations and Procedures Manual shall be completed, maintained and available to all stakeholders. Such a manual may include such things as detailed purchasing procedures, budget procedures and timelines, human resources process details, etc.</li> <li>A library of tutorials on business and financial processes shall be available to all staff</li> <li>Automate as many financial processes as possible</li> </ul>						



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<b>Finance &amp; Budgeting</b> <b>Overall Goal:</b> Develop and maintain a financial plan to support the implementation of the academic strategic plan that is transparent and fiscally prudent.	<b>JULY - DECEMBER</b> <ul style="list-style-type: none"> <li>Finalize 2013-14 budget and present five (5) year projection to initiate budget planning for 2014-15</li> <li>Plan for referendum to be presented to electorate in Spring, 2014 with Board approval at the November, 2013 Board meeting</li> </ul>	<b>JULY - DECEMBER</b> <ul style="list-style-type: none"> <li>Finalize 2014-15 budget and present five (5) year projection to initiate budget planning for 2015-16</li> <li>Study open enrollment in conjunction with the enrollment/community needs study under “Buildings &amp; Grounds” focus with recommendations to be made by the May joint meeting</li> <li>Develop formalized process for staffing additions to be used in the 2015-16 budget process by the January joint meeting</li> </ul>	<b>JULY - DECEMBER</b> <ul style="list-style-type: none"> <li>Finalize 2015-16 budget and present five (5) year projection to initiate budget planning for 2016-17</li> <li>Develop a list of current partnerships with other agencies and organizations</li> </ul> <b>JANUARY - JUNE</b> <ul style="list-style-type: none"> <li>Finalize list of current partnerships with other agencies and organizations</li> <li>Plan for referendum to be presented to electorate in Spring, 2017 with Board approval at the November, 2016 Board meeting</li> </ul>	<b>JULY - DECEMBER</b> <ul style="list-style-type: none"> <li>Finalize 2016-17 budget and present five (5) year projection to initiate budget planning for 2017-18</li> <li>Develop “exploratory” list of partnerships with other agencies and organizations</li> </ul> <b>JANUARY - JUNE</b> <ul style="list-style-type: none"> <li>Develop “exploratory” list of partnerships with other agencies and organizations</li> <li>Pursue “exploratory” list of partnerships with other agencies and organizations</li> <li>Communicate the referendum on the ballot in Spring, 2017</li> </ul>	<b>JULY - DECEMBER</b> <ul style="list-style-type: none"> <li>Finalize 2017-18 budget and present five (5) year projection to initiate budget planning for 2018-19</li> <li>Plan for the retirement of \$2 million of referendum approved debt in 2020-21</li> <li>Develop “exploratory” list of partnerships with other agencies and organizations</li> <li>Pursue “exploratory” list of partnerships with other agencies and organizations</li> </ul> <b>JANUARY - JUNE</b> <ul style="list-style-type: none"> <li>Formalize an initial plan to leverage the retirement of \$2 million of referendum approved debt in 2020-21</li> <li>Develop-“exploratory” list of partnerships with other agencies and organizations</li> <li>Pursue “exploratory” list of partnerships with other agencies and organizations</li> </ul>	<p>Project the financial needs of the District given imposed external limitations on unknown variables.</p> <p>Incorporate into the long range fiscal projections a debt retirement strategy that maximizes the District’s ability to support its programs and services while considering the impact to local taxpayers.</p> <p>Develop a long term fiscal strategy to maintain high level programs and services within state and federally imposed fiscal constraints.</p> <p>Conduct an open enrollment study to guide future planning.</p> <p>Maximize alternative revenue sources.</p> <p>Explore partnerships with other agencies and organizations in an effort to effectively reduce costs.</p>
<b>MEASURES OF SUCCESS</b> <ul style="list-style-type: none"> <li>Five (5) year projections shall be presented annually to the Board of Education to initiate budget planning for the next fiscal year</li> <li>The District will maximize the opportunity provided by the retirement of the referendum debt used to fund the High School</li> <li>A plan to leverage the retirement of the referendum debt used to fund geothermal installations shall be drafted by July 1, 2018</li> <li>An open enrollment study with recommendations shall be completed</li> <li>Alternative revenue sources and partnerships (sponsorship, open enrollment, etc.) shall increase over the five year period</li> </ul>	<b>JANUARY - JUNE</b> <ul style="list-style-type: none"> <li>Communicate the referendum on the ballot in Spring, 2014</li> </ul>	<b>JANUARY - JUNE</b> <ul style="list-style-type: none"> <li>Study open enrollment in conjunction with the enrollment/community needs study under “Buildings &amp; Grounds” focus and make recommendations by the May joint meeting</li> </ul>				