



# Sun Prairie Area School District

Futures depend on us...every child, every day.

## 2018-19 Department Level Scorecard and Action Plan

Department: Business Services

Director: Phil Frei

Link to [District Scorecard](#)

### Business Services Scorecard

Results Measures	Q1 11/15	MY 1/15	Q3 3/15	EOY 6/30
Fund the instructional vision and strategic plan through an aligned resource allocation plan for the 2019-20 school year and beyond: <ul style="list-style-type: none"> <li>Completion of action steps in <a href="#">budget and staffing calendar</a></li> </ul>	<a href="#">16 out of 16 actions are completed</a>	<a href="#">20 of 21 actions are completed</a>	<a href="#">76 of 79 actions are completed</a>	<a href="#">15 new strategic budget proposals are funded for a total of \$1.3M</a>
Increase the district's financial standing through excellence in business operations: <ul style="list-style-type: none"> <li>Increase fund balance percentage</li> </ul>	<a href="#">Added to fund balance in 17-18</a> <a href="#">Clean audit</a> Budget forecasting has begun	Initial steps in monitoring 2018-19 budget has begun	Initial steps in monitoring 2018-19 budget has begun	Fund Balance is projected to increase from 13 to 15%

### Facility and Operations Strategic Goal:

In order to demonstrate fiscal stewardship, we will increase the district's financial standing through excellence in business operations.

*Maintain or Increase the Bond Rating  
Increase the General Fund Balance  
Implement Best-in-Class Business Operations*

Strategy Map:	Balanced Scorecard:		Action Plan			Q1 11/15	MY 1/15	Q3 3/15	EOY 6/30
Objectives	Measurement	Target	Timeline (by when)	Supporting Initiative	Budget				
Maintain or increase the district's bond rating	S & P Bond rating	Currently AA AA+	Fiscal Year 2018-19	Quarterly meetings with RW Baird on steps that are needed to obtain this target <ul style="list-style-type: none"> <li>• October</li> <li>• January</li> <li>• April</li> <li>• June</li> </ul>			Main- tained AA	Main- tained AA	Main- tained AA
Increase the district's fund balance	Ending fund balance %	12%	June 30, 2019	Accurate tracking of expenses and revenues  Projecting end-of-year balances using PMA and spreadsheets  Control of expenses as needed		13%			15%
Implement paperless processes and procedures to improve business operations	Implement major new procedures	One	October 2018 - June 30, 2019  Ongoing  October 2018 - June 30, 2019  October 2018	<b>Full implementation of online expense reimbursements</b>  In Skyward for all staff - Done  Regular meetings with Business Services Manager, Accountant, and Accounting Assistants to discuss adjustments to the process  <b>Major rewrite of the field trip process:</b>  Business Office reviews current policy Meet with stakeholders to obtain feedback	Online tutorial Online training video 5 training sessions held  Field trip permission form is revised and online				<a href="#">Busi- ness Office Reco- urses -Expe- nse Reim- burse- ments</a>

			January 2019	Revise policy/procedure and form	Online routing of field trip process will be piloted at SPHS and PMMS				
			April 2019	Finalize for Fall 2019 implementation					
			June 2019	<b>Cross-training of critical job duties by Business staff</b>					
			October 2018 - June 2019	Review last year's critical tasks to confirm cross-training assignees is appropriate					
			October 2018	Work with assignee to complete task one time per quarter					
			January 2019 - June 2019	Professional development of staff including WASBO Spring, Fall and Accounting Conference					
			On-going						

**Facility and Operations Strategic Goal:**

In order to maximize district resources, the instructional vision and strategic plan will be annually aligned to the resource allocation plan.

*Staffing plan*

*Completion of step in budget process*

Strategy Map:	Balanced Scorecard:		Action Plan			Q1 11/15	MY 1/15	Q3 3/15	EOY 6/30
Objectives	Measurement	Target	Timeline (by when)	Supporting Initiative	Budget				
Complete staffing plan	If staffing plan is implemented	<i>Completion</i>	July 1, 2018 - June 30, 2019	Develop a staffing plan with HR Implement the staffing plan and meet target dates	\$0 direct				
Completion of action steps in budget process	If budget steps are completed on time	<i>On-time</i>	July 1, 2018 - June 30, 2019	Develop a Strategic Budget and Staffing Calendar Implement the Strategic Budget and Staffing Calendar and meet target dates	\$0 direct				

**Facility and Operations Strategic Goal:**

In order to provide an environment that promotes positive spaces for working and learning, we will continue Master Facilities and Grounds Planning processes.

*Enrollment Projections  
Secondary School Space Planning Committee work*

Strategy Map:	Balanced Scorecard:		Action Plan			Q1 11/15	MY 1/15	Q3 z3/15	EOY 6/30
Objectives	Measurement	Target	Timeline (by when)	Supporting Initiative	Budget				
Enrollment Projections	Updated enrollment projections	Completed	December 30, 2018	Work with UW-APL to complete Work with MD Roffers to complete	\$15,000				
Secondary School Space Planning Committee	Meet referendum deadline	Completed	April 2, 2019	Work with school space planning internal committee	N/A				