

Wilson School District #7  
5 Year Strategic and Tactical Plan 2021-2026

**Strategic Plan**

Statement of Issue: *Why?*

To ensure accountability transparency, and innovation on finance, technology, food service and M&O

Statement of Goal: *What?*

**The alignment of fiscal, technological, and physical resources will ensure that WESD will achieve its mission and vision**

Innovation Area Finance, Technology, Food Service, and Maintenance & Operations Date to be Completed: Ongoing Responsible Party: Finance, Technology, Food Service, and Maintenance & Operations Committee

**Tactical Plan of Action**

**Finance**

Objectives –Sub Goals <i>What?</i>	Critical Work Activities CWA <i>How?</i>	Responsible Person(s) <i>Who?</i>	Human Resource/ Physical Resource Required	FTE / Materials - Estimated Cost	Start (S) Completion(C) Date <i>When?</i>	Evidence of Accomplishment
<b>Goal 1: Provide District solvency with budgets that support Board goals, District priority, and District policies.</b>	A. Increase stakeholder knowledge and understanding of school funding with community/staff meetings.	Director of Business Services & Technology	Budget Accounting Specialist  Grants Coordinator  Director of Business Services & Technology	Salaries & Benefits required for positions	07/01/2022 - 06/30/2026  Ongoing	Yearly stakeholder meetings to review the new fiscal year expenditure budget.
<b>Goal 2: Generate a balanced budget to include sufficient carry-over.</b>	A. Implement and maintain a sustainable budget.	Director of Business Services & Technology	Budget Accounting Specialist  Director of Business Services & Technology		07/01/2022 - 10/15/2023  Due Annually July Revisions Due: December, if required, and May.	Annual Carry Forward amount represented on the BUDG75 report after AFR submission.  BUDG75 dated Jan 31, 2023 M&O Carry Forward: \$479,681 UCO Carry Forward: \$549,279

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<p><b>Goal 3: Design a District-wide capital acquisitions plan.</b></p>	<p>A. Compile detailed information, obtained from necessary supervisors.  B. Implement a capital item purchasing timeline.</p>	<p>Director of Business Services &amp; Technology</p>	<p>Site Administrators  Building and Grounds Supervisor  Business Manager</p>		<p>A. June FY24  B. July FY25</p>	<p>Capital acquisition plan developed and implemented for a continuous 5-year look-ahead.  In FY23, we have moved forward with several capital projects approved through SFB, as well as others funded from remaining bond monies, ESSER, and the City of Phx.</p>
<p><b>Goal 4: Construct a comprehensive grants program.</b></p>	<p>A. Design an entitlement &amp; competitive grants program that will enable the District to secure and utilize additional funding.</p>	<p>Grant Coordinator</p>	<p>Grants Coordinator  Director of Business Services &amp; Technology</p>		<p>June 2024</p>	<p>Funds allocated for entitlement and competitive grants to allow for greater District reserves of public funds.  A Grants Coordinator was hired. He attends yearly trainings and conferences</p>
<p><b>Goal 5: Convene an advisory committee (group) to evaluate and provide recommendations on spending funds</b></p>	<p>A. Open discussion on ways to save funds. (Purchasing Cooperatives, discount retailers, school printing, etc.). B. Train committee on school finance C. Create a policy and</p>	<p>Budget Accounting Specialist  All Department heads</p>	<p>Certified Employee (s)  Classified Employees (s)  Community Stakeholders Budget</p>		<p>A. 07/01/2022 - 06/30/2026 B. Start in Fall FY24 C. Ongoing</p>	<p>Quarterly meetings.  Budget Specialist, Grants Coordinator &amp; Business Director keep</p>

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	procedure manual for committee work.		Accounting Specialist Building & Grounds Supervisor Technology Supervisor Grants Coordinator Director of Business Services & Technology			an open door. Emails have lessened, and in person talks have increased. (May 2023)
<b>Goal 6: Generate a thorough guide of business office procedures.</b>	<p>A. Create an FAQ / checklist for school use on the District requirements for purchasing (Req’s, PO’s, packing slips, etc.).</p> <p>B. Assemble a Student Club Advisors Handbook (distribute &amp; training).</p> <p>C. Create a “Transacting with the</p>	<p>Budget Accounting Specialist</p> <p>Director of Business Services &amp; technology</p>	<p>Budget Accounting Specialist Accounts Payable</p> <p>Specialist Payroll</p> <p>Accounting Specialist</p> <p>Director of Business &amp; Technology</p>		<p>A. 7/30/2023</p> <p>B. 8/30/2023</p> <p>C. In process, 7/30/2023</p>	<p>FAQ/checklist distributed and utilized.</p> <p>Published handbooks for:</p> <p>Student Club Advisors – Transacting with the Business Office (Full version for business office employees and condensed version “what they need to know” for campus employee).</p>

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	Business Office” handbook, explaining office procedures & office positions					“How To” documents accessible to staff.
<b>Technology</b>						
<b>Goal 1: Maintain and support IT department goals, objectives, and initiatives.</b>	A. Create a modern and comprehensive technology department structure. B.	Technology Supervisor  Executive Director of Business Services	Technology Department	Salaries & Benefits required for positions	A. Start in Oct FY24 B. Start in Oct FY24 C. It is included in the Business Services Section each month D. Ongoing E. Done May 30, 2022 F. Ongoing	Governing Board Presentation of completed structure and plans.  Quarterly cabinet reports.  Monthly district newsletter.
<b>Goal 2: Streamline and modernize District operations through integrations, systems automation, and enhanced security.</b>	A. Communicate available services on the IT department tab on the WSD website. B. Create and maintain a digital security plan. C. Evaluate digital communication platforms to ensure	Technology Supervisor  Executive Director of Business Services	Technology Technician I  Technology Technician II  Technology Supervisor  Director of Business Services & Technology		A. Done in FY22 B. Using the AZDOHS CyberReadiness Programs in compliance with the TRUST. Done by June 30, 2023. C. January 2024	Decline in helpdesk tickets.  Board and Insurance company approved plan.  Publication of a comprehensive list of digital communication needs.  Publication of the integration guide.

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	<p>they meet district needs.</p> <p>D. Design a technology integration guide.</p> <p>E. Evaluate District print and copy model, with the goal of reducing costs.</p> <p>F. Evaluate the need for a central analytics platform.</p>				<p>D. June 2024</p> <p>E. December 2023</p> <p>F. No Current Need. ADE School Finance will launch this platform in FY24</p>	<p>Cabinet presentation of viability.</p> <p>Cabinet presentation of evaluation findings.</p>
<p><b>Goal 3: Restructure, maintain, and provide support/training for Student Information Systems (SIS) and Digital Records.</b></p>	<p>A. Create a Technology Data Specialist position to manage SIS operations.</p> <p>B. Restructure user permissions.</p> <p>C. Create a SIS compliance/utilization policy.</p>	<p>Board Secretary / Data Coordinator</p> <p>Technology Supervisor</p>	<p>Infinite Campus Users</p> <p>Technology Technician I &amp; II</p> <p>Technology Supervisor</p> <p>Director of Business Services &amp; Technology</p>	<p>\$40,000 - \$50,000/ Year</p>	<p>A. July 2024</p> <p>B. Done FY22</p> <p>C. June 2025</p>	<p>Successful onboarding of the Technology Data Specialist.</p> <p>Approval from an internal audit of user security.</p> <p>Board approved compliance and utilization policy.</p> <p>File Created on User Roles</p>

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<p><b>Goal 4: Provide high quality customer service, staff support, and training.</b></p>	<ul style="list-style-type: none"> <li>A. Create a Technology Support Specialist</li> <li>B. Create and maintain a comprehensive technology onboarding and training plan</li> <li>C. Communicate available tools on the IT Department tab of the District website</li> <li>D. Develop technology onboarding courses and continuing training classes</li> <li>E. Monitor and evaluate the level of customer service, staff support, and training through quarterly surveys.</li> </ul>	<p>Technology Supervisor</p>	<p>Technology Technician I &amp; II</p> <p>Technology Supervisor</p> <p>Director of Business Services &amp; Technology</p>	<p>\$40,000 - \$50,000/ Year</p>	<ul style="list-style-type: none"> <li>A. Done FY22. We have 2: 1 Tech, 1 Lead</li> <li>B. In process August 2023</li> <li>C. Done FY22</li> <li>D. Done FY22 – IT training through Mimecast</li> <li>E. Launch in January FY24</li> </ul>	<p>Successful onboarding of the Technology Support Specialist.</p> <p>Implementation of trainings utilizing a shared calendar (7/1/2023).</p>
<p><b>Goal 5: Establish a central Project Management platform.</b></p>	<ul style="list-style-type: none"> <li>A. Deploy a project management solution such as (Microsoft Projects, ZOHO, or Salesforce).</li> <li>B. Train staff on Project Management Platform.</li> </ul>	<p>Technology Supervisor</p> <p>Building and Grounds Supervisor</p>	<p>Building and Grounds Supervisor</p> <p>Technology Supervisor</p> <p>Director of Business Services &amp; Technology</p> <p>Teamwork (the software)</p>	<p>\$5,500/ Year</p>	<p>Pilot in October 2023 Launch in November 2023</p>	<p>Project snapshots (Progress and completion reports) – quarterly.</p>

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<b>Maintenance and Operations</b>						
<b>Goal 1: Maintain and support Maintenance &amp; Operation department goals, objectives, and initiatives.</b>	<ul style="list-style-type: none"> <li>A. Create a comprehensive maintenance and operations department structure.</li> <li>B. Generate and sustain a tools/machinery end of life and reuse plan.</li> <li>C. Write a Maintenance &amp; Operations section in the monthly newsletter.</li> <li>D. Quarterly cabinet reports.</li> </ul>	<ul style="list-style-type: none"> <li>Building and Grounds Supervisor</li> <li>Executive Director of Business Services</li> </ul>	<ul style="list-style-type: none"> <li>Mechanical Maintenance</li> <li>Lead Custodians</li> <li>McKinney Vento Liaison</li> <li>Maintenance/Bus Driver</li> <li>Building and Grounds Supervisor</li> <li>School Facilities Board</li> </ul>	Salaries & Benefits required for positions	<ul style="list-style-type: none"> <li>A. 9/2023</li> <li>B. Practiced, but not in writing. June 2024</li> <li>C. Ongoing</li> <li>D. Ongoing</li> </ul>	<ul style="list-style-type: none"> <li>Governing Board Presentation of completed structure and projects.</li> <li>Provide a detailed list for end of life &amp; re-use plan to Governing Board.</li> <li>Quarterly cabinet reports. Monthly district newsletter.</li> </ul>
<b>Goal 2: Ensure facilities are clean and safe for the learning environment as well as be aesthetically pleasing to foster student recruitment.</b>	<ul style="list-style-type: none"> <li>A. Maintain a comprehensive list of interior checks and balances.</li> <li>B. Prepare a detailed list of interior projects and corresponding completion dates.</li> <li>C. Prepare a detailed list of exterior projects and corresponding completion dates.</li> <li>D. Evaluate building</li> </ul>	<ul style="list-style-type: none"> <li>Buildings and Grounds Supervisor</li> <li>Executive Director of Business Services</li> </ul>	<ul style="list-style-type: none"> <li>Mechanical Maintenance</li> <li>Lead Custodians</li> <li>Landscaper</li> <li>Buildings and Grounds Supervisor</li> </ul>	N/A	<ul style="list-style-type: none"> <li>A. Ongoing</li> <li>B. Dec 2022, Update in Teamwork by Aug 2023</li> <li>C. Dec 2022, Update in Teamwork by Aug 2023</li> <li>D. Done FY21</li> <li>E. SFB has this reporting</li> </ul>	<ul style="list-style-type: none"> <li>Complete projects in a timely manner.</li> <li>Provide the Governing Board with complete listings for interior, exterior &amp; grounds keeping needs.</li> <li>Quarterly review of classroom cleaning.</li> <li>Report on total/per</li> </ul>

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	<p>square footage to determine appropriate custodial personnel needed.</p> <p>E. Establish process for annual review of structural repair needs of all facilities and outdoor spaces.</p> <p>    a. Replace/maintain the track at the elementary school.</p> <p>    b. replace turf under playground equipment at the elementary school.</p> <p>    c. Paint outside basketball courts at both campuses.</p> <p>    d. Replace/repair the roof at the primary school.</p> <p>    e. Maintain fall zone under all playground equipment.</p> <p>    f. Establish bird control</p>				<p>requirement – it is done annually.</p> <p>E-a Summer FY23</p> <p>E-b Done</p> <p>E-c Dec FY24</p> <p>E-d Fall FY24</p> <p>E-e Ongoing</p> <p>F. Done. Fall FY22.</p>	<p>person to cabinet.</p> <p>Social Media and Monthly Newsletter postings on project completions.</p> <p>Backup plan for when staff call out.</p>



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<b>Goal 3: Provide clean, safe, and reliable student transportation.</b>	A. Establish a transportation vehicle service plan.	Maintenance/Bus Driver	Maintenance /Bus Driver	TBD/Initial Year (\$20,000/year)	A. Required by ADE Annually.	Completed Plan.
	B. Implement Vehicle Service Plan.	Mechanical Maintenance	McKinney Vento Liaison	Annually \$8,000.00	B. Ongoing and tracked.	Quarterly review of transportation vehicle records.
	C. Train drivers using guidelines set forth by The Trust.		Building and Grounds Supervisor		C. Drivers of Students’ Training is Req’d by the TRUST for insurance, and by the STATE and by the FEDERAL Government. To meet requirements, this is ongoing.	Reduction in unplanned service.
	D. Hire and train additional bus drivers.		Additional School Staff		D. Currently Fully Staffed	Trained Drivers and Staff
	E. Purchase an additional school bus.		Additional Support Staff		New Bus arrived in October of 2022.	
<b>Food Service</b>						
<b>Goal 1: Provide a healthy nutrition program for all students</b>	A. Provide healthy choices such as fruits, vegetables, and main courses.	District Food Service Clerk	Southwest Foodservice Excellence	Salaries & Benefits required for the positions	A. Done Daily. Req’d by ADE HNS and NSLP	Limited waste
	B. Provide scratch (homemade) meals, breads and desserts		Technology		B. Done Daily - SFE makes items from scratch as available and time permits	Excellent survey results
	C. Appropriate portion sizes	Director of Business Services & Technology	Supervisor University of Arizona	Cost of Food Services Vendor	C. Done Daily –	Serving meal choices to accommodate various ethnic groups.
	D. Periodically review menus to include various ethnic group					Updated and redesigned wellness policy.

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	meals E. Perform annual audit and review of food service provider F. Survey families regarding food service (service, quality of food, food choices, etc.) G. Review and update food serving traffic flow.				Req'd by ADE HNS and NSLP D. Monthly. Req'd by ADE HNS and NSLP E. Done Annually by ADE HNS, NSLP & the 3 <sup>rd</sup> Party auditors F. Done Annually as part of SFE's Program G. Spring of FY24	Smarter lunchroom movement.
<b>Goal 2: Design a team environment between WSD#7 and Food Service Management Company</b>	1. Create and maintain common team efforts.	District Food Service Clerk  Director of Business Services & Technology	Southwest Foodservice Excellence (or current Food Service Management Company)		On-going  SFE, Facilities Manager & Business Director have worked together to better define roles, relieving some of the uncertainty.	Team unity between WSD#7 and current Food Service Management Company

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<b>Goal 3: Maintain comprehensive Food Service Wellness Policy</b>	1. Update tri-annual wellness policy in partnership with University of Arizona	District Food Service Clerk  Director of Business Services & Technology	University of Arizona  Southwest Foodservice Excellence (or current Food Service Management Company)		6/30/2022	Comprehensive three (3) year Food Service Wellness Policy