

**Vision for Excellence in
Finance and Operations**

2021-2024

Approved April 2021



SWALLOW SCHOOL DISTRICT
INSPIRING EXCELLENCE SINCE 1844

Introduction

Among the hallmarks of a high performing school district are sound financial policies and oversight coupled with efficient and innovative operational measures that ensure students are at the center of all decisions. During the Winter of 2020, the School Board and administration met with parents and staff to identify opportunities for improvement in curriculum and programming as well as services the district provides. Ideas generated were then prioritized and taken into account during the school board's Long Range Planning process to ensure the vitality of our district and focus on students even in lean budget times.

The Swallow School District is routinely designated as being in the top 10 school districts in the state for having the highest return on investment for taxpayers (as measured by cost per student and student achievement metrics reported by the Wisconsin Department of Public Instruction). The school board and administration have worked hard to pay for expected maintenance needs while planning for future ones. This is not only beneficial for taxpayers financially, but provides a safe building and grounds. These two areas of focus, coupled with strategic marketing and branding, are the levers to ensure achievement of next steps and desired goals and objectives in this strategy area.

Overview of Action Plan

Strategic Objectives	Create maximum value for our community and opportunities for students through strategic financial management.	Through efficient and effective operational processes, ensure the safest building and grounds for the benefit of all stakeholders.	Utilizing strategic marketing, the Swallow School District brand will grow market share and aid in the employee recruiting process.
Key Performance Indicators	<ul style="list-style-type: none"> ● Working Capital Fund Balance to Avoid Cash Flow Borrowing ● Community investment above taxes--fundraisers, grants, donations, partnerships, volunteer hours ● State and Federal Reports submitted on Time ● 100% of Bills Paid on Time ● Building Maintenance/Capital Improvement Plan to support student growth and engagement within budget parameters ● Participation in Food Service Program ● Profitability of Food Service Program ● Community Use of Building and Grounds ● Workers Compensation Claims ● Zero Findings on Fire Marshal and/or Property Insurance Safety Reviews ● Marketing outreach and campaigns ● Social Media Campaigns ● Designation on State District and School Report cards ● NICHE rankings ● Percentage of market share for resident students ● Net-positive open enrollment rate ● Favorable responses in perceptual data gained via Annual Satisfaction Surveys <ul style="list-style-type: none"> ○ Culture of Educational Excellence Index ○ Leadership Index ○ Safe and Healthy Schools Index ○ Sense of Community Index ○ Effective Teaching Index ○ Communications Index 		
Key Questions	<p>How are relationships nurtured and leveraged to achieve outcomes?</p> <p>What communication is needed at what points in this action plan to ensure stakeholder understanding, buy in, and feedback are part of the success in achieving outcomes?</p>		

<i>YEAR</i>	<u>Foundational Year (2020-21)</u>	<u>Year One (2021-22):</u>	<u>Year Two (2022-23)</u>	<u>Year Three (2023-24)</u>
			In addition to the goals and expectations outlined for 2021-22, the following will be achieved:	In addition to the goals and expectations outlined for 2022-23, the following will be achieved:
Create maximum value for our community and opportunities for students through strategic financial management.	<p>Review established budget process and determine ways to refine it that assist in better aligning resources with district goals and action plans (i.e. targeting specific PD, curriculum, support, purchases to the goals).</p> <p>Develop a multi-year budget forecast that takes into account district goals and action plans and establishes priorities and needs (by October 2021)</p> <p>Evaluate all amounts that are currently in each fund and those that are reserved for future expenses (i.e.: Fund 10, Fund 21, Fund 41, Fund 46, Fund 50, Fund 73)</p> <p>Review the 2019 Capital Improvement Plan and remove all items completed by recent referendum projects. Then, develop a new plan based on life expectancy of major mechanicals and furniture, fixtures, and equipment on the grounds and in the building.</p>	<p>Implement refined budget process that assists in better aligning resources with district goals and action plans.</p> <p>Determine annual Fund Balance needs for cashflow purposes based off of five year forecast.</p> <p>Create new fund balance plan due to construction completion, updated capital improvement plan, technology plan, and five year forecast.</p> <p>Budget for short and long term Capital Improvement needs.</p> <p>Collaborate with the Swallow Education Foundation and other donors and granting organizations to find additional funding to support established district goals, action plans, and priorities.</p>	<p>Develop a multi-year budget forecast that takes into account district goals and action plans and establishes priorities and needs (by October 2023)</p> <p>Reconcile fund balance plan--restricted, assigned, and unassigned to align with recommendations, cash flow needs, and established district priorities.</p> <p>Determine revenue sources from Building Rentals.</p>	<p>Review Fund Balance needs and plan for cashflow purposes based on capital improvement plan, technology plan, and five year forecast</p> <p>Review the 2021 Capital Improvement Plan and remove all items completed and engage the community in the Facilities Study process.</p>

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			In addition to the goals and expectations outlined for 2021-22, the following will be achieved:	In addition to the goals and expectations outlined for 2022-23, the following will be achieved:

<p>Through efficient and effective operational processes, ensure the safest building and grounds which support the growth of all stakeholders.</p>	<p>Technology audit leading to planning for new/different solutions to meet present and future needs.</p> <p>Update in-house documents and safety protocols as warranted from the building renovation project.</p> <p>Plan for real-life scenarios and case studies for students to participate in critical thinking through the mandated monthly fire drills, twice a year Lock Down drills, and annual tornado drills along with other emergency drills as deemed necessary.</p> <p>Training with bus company around safety/student discipline/behavior management.</p> <p>Review alternative Property/Liability/WC insurance carriers to ensure best coverage and rates.</p> <p>Investigate methods to increase revenue and participation, or cut expenses, without decreasing the quality of the Food Service program.</p>	<p>Create a five year Technology Plan based on audit.</p> <p>Reconvene local emergency personnel to review and revise our overall Emergency Operations and Crisis Response Plan</p> <p>Creation of physical storage protocols throughout the building (ref--chemicals, hazardous materials, and safe heights, fire marshall requirements).</p> <p>Implement methods to increase revenue and participation, or cut expenses, without decreasing the quality of the Food Service program.</p> <p>Develop process to share information about nutrition between Food Service staff and teachers of health and science curriculum.</p> <p>Investigate catering for parent/staff/community meals.</p>	<p>Training with bus company around safety/student discipline/behavior management</p> <p>Review alternative Property/Liability/WC insurance carriers to ensure best coverage and rates</p> <p>Review safety and security protocols</p> <ul style="list-style-type: none"> ● Evaluate current procedures and equipment ● Evaluate new technology <ul style="list-style-type: none"> ○ provide recommendations for status quo or replacement cycle <p>Communications to parents and community about sources, nutritional value and preparation process of foods served at Swallow.</p> <p>Offer catering for parent/staff/community meals if viable.</p>	<p>Implementation of recommended updates to safety and security protocols and technologies.</p> <p>Service-learning project student-led gardening project that provides food for Food Service and/or community.</p>
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			<p>In addition to the goals and expectations outlined for 2021-22, the following will be achieved:</p>	<p>In addition to the goals and expectations outlined for 2022-23, the following will be achieved:</p>

<p>Through strategic marketing, the Swallow School District brand will grow market share and aid in the employee recruiting process.</p>	<p>Ensure web and social media presence highlights benefits of working at Swallow School.</p> <p>Current employees recruit staff to Swallow when there is an opening.</p> <p>Learn more about how to be nominated as a Top Workplace.</p> <p>Develop updated marketing materials--both print for homes for sale/realtors as well as videos capturing renovated building and impact of Swallow experience.</p> <p>Host realtor tour on non-school day and provide updated marketing materials.</p> <p>New homebuyer welcome kits prepared and presented to residents upon move in.</p>	<p>Meet with local institutions of higher education to formalize partnerships for student teachers and offerings to current staff that broaden licensure and deepen expertise.</p> <p>Present at conferences to ensure those in the field know about our district.</p> <p>Determine how to track newborns within the district and send Welcome Onesie!</p> <p>Progression to meet benchmarks as a Top Workplace.</p>	<p>Ensure a coherent process for news articles--both informational and fun, are provided on the website/social media accounts and to local media outlets.</p> <p>Present to Chamber of Commerce and local businesses about our unique district.</p> <p>Submit to become nominated as a Top Workplace.</p>	<p>Host Realtor Lunch, especially for new realtors to the area.</p> <p>Research Quality Award(s) to seek.</p>
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