



2019.20

DIVISION IMPROVEMENT PLAN

Division Name: Business (Finance)

Director: Laurie Albritton

Date of School Board Approval:

GOAL ONE

Goal:

Enhance communications with various District audiences or stakeholders.

Objective 1:

Utilize differentiated forms of communication to more effectively meet the needs of various audiences or stakeholders.

Strategies:

- Schedule progressive face to face meetings.
- Distribute “informational” e-mail notices.
- Tailor communications for specific groups on issues in the area of need.
- Review the Finance Division website and update as necessary.

Evaluation:

Review communications for usefulness and relevancy to various stakeholders.

Professional Development Aligned with this Objective:

N/A

Objective 2:

Customer satisfaction should increase when communication is open, on-target and satisfactorily meets customer's expectations.

Strategies:

- Hold monthly Division meetings to ensure staff is informed on areas of need.
- Hold topic-specific meetings with appropriate staff.
- Review communications from staff to customers for improvement.

Evaluation:

Survey customers on the level of effectiveness on requested needs.

Professional Development Aligned with this Objective:

Objective 3:

The Finance Division will provide financial information to our customers in an efficient, timely, and accurate manner.

Strategies:

- Review current procedures in responding to financial inquiries.
- Identify specific groups and types of useful financial data for an area of need.
- Review timelines for distribution of financial data.

Evaluation:

Maintain and review communications file for usefulness and relevant material.

Professional Development Aligned with this Objective:

N/A

Budget: (No current budget items included for this goal.)

Evidence-based Program(s)/Material(s)

Description of Resources	Funding Source	Available Amount	
			Total:

Technology

Description of Resources	Funding Source	Available Amount	
			Total:

Professional Development

Description of Resources	Funding Source	Available Amount	
			Total:

Other

Description of Resources	Funding Source	Available Amount	
			Total:

Final Total: \$0

GOAL TWO

Goal:

Provide staff with training opportunities for professional growth to achieve and maintain high levels of morale, productivity, and employee performance.

Objective 1:

Expand the level of highly productive and motivated staff within the department to make better job-related decisions and reduce the level of supervision.

Strategies:

- Explore new self-development experiences each year by continuing cross-training opportunities within the division.
- Develop succession planning for critical positions due to retirements in the near future.
- Visit surrounding districts on Skyward to evaluate how they are utilizing the system.
- Introduce opportunities to staff to attend workshops, conferences, and webinars that are appropriate to area of responsibility and cross-training.
- Share and apply information that is beneficial to all involved.

Evaluation:

Review training opportunities and evaluate the progress of cross-training progress.

Professional Development Aligned with this Objective:

N/A

Objective 2:

Provide support staff in other areas with a variety of technology and training opportunities for continued growth.

Strategies:

- Evaluate and prioritize training needs annually based on the highest level of interest or need.
- Utilize in-house personnel who are proficient in their area of expertise to provide training for areas of need.
- Develop a mentoring process to assist new staff in creating an environment where they are confident and successful.

Evaluation:

Review training opportunities that were provided and the usefulness for job-related performance.

Professional Development Aligned with this Objective:

N/A

Objective 3:

Promote a clear understanding of responsibilities to all staff and relay area of responsibility to our customers.

Strategies:

- Hold monthly division meetings with finance staff and update/discuss/share where the district/division is heading.
- Hold bookkeeper meetings with finance staff sharing their area of expertise.
- Update website listing areas of responsibility for each staff member

Evaluation:

Assessment evaluations shall be distributed, collected, and used to solicit feedback at the end of the Bookkeeper Meetings.

Professional Development Aligned with this Objective:

PATH Points earned by employees.

Objective 4:

Promote Class Wallet to instructional staff for a clear understanding of allowable purchases from Florida Teacher Classroom Supply Assistance Program.

Strategies:

- Send communications to instructional staff as to the proper use of funds.
- Send communications to instructional staff to introduce Class Wallet as an online reimbursement or marketplace portal for classroom supplies for 2019.20.
- Coordinate with Class Wallet names of instructional staff and allocation per teacher.
- Coordinate with Class Wallet unspent funds to be returned to the district and distribute to appropriate School Advisory Councils.

Evaluation:

To empower Instructional staff with the technology for purchasing classroom supplies and reducing the amount of paperwork by utilizing the Class Wallet platform.

Professional Development Aligned with this Objective:

PATH Points earned by employees.

Budget:

Evidence-based Program(s)/Material(s)			
Description of Resources	Funding Source	Available Amount	
			Total:
Technology			
Description of Resources	Funding Source	Available Amount	
			Total:
Professional Development			
Description of Resources	Funding Source	Available Amount	
			Total:
Other			
Description of Resources	Funding Source	Available Amount	
			Total:
			Final Total:

GOAL THREE

Goal:

Ensure that district records are properly maintained and reporting is performed per Board Policies, State and Federal Laws.

Objective 1:

All audits are in compliance.

Strategies:

- Review audit findings in Operational, Financial, Internal Accounts, and Federal Programs.
- Identify areas of non-compliance and implement a plan to assure areas are in compliance.
- Review legislative changes and implement changes that affect financial reporting requirements.

Evaluation:

Staff is aware of audit compliance.

Professional Development Aligned with this Objective:

N/A

Objective 2:

Promote expectations of Audit Standards and integration of compliance requirements into all phases of the District operation.

Strategies:

- Review and implement changes in financial reporting requirements to meet audit standards.
- Review and implement DOE and legislative changes that affect the district whether these require policy changes or have a financial impact.

Evaluation:

Audits are in compliance, and staff is knowledgeable on upcoming changes.

Professional Development Aligned with this Objective:

N/A

Budget: (No current budget items included for this goal.)

Description of Resources	Funding Source	Available Amount	
Total:			
Technology			
Description of Resources	Funding Source	Available Amount	
Total:			
Professional Development			
Description of Resources	Funding Source	Available Amount	
Total:			
Other			
Description of Resources	Funding Source	Available Amount	
Total:			
Final Total:			

GOAL Four

Goal:

Ensure School Stream forms and Skyward program is utilized in the most efficient and effective manner.

Objective 1:

Assist Human Resources in identifying users of the Personnel Action Form and streamlining document process.

Strategies:

- Meet with staff regarding use of the Personnel Action Form (PAF) and identify required fields.
- Revise Personnel Action Form and assist in written procedures for staff and training for end-users.
- Review PAF approval routing vs. staff notification for effectiveness.
- Develop and submit a plan for approval.

Evaluation:

The staff has the information needed to process employee information.

Professional Development Aligned with this Objective:

N/A

Objective 2:

Assist Human Resources in Position Control process.

Strategies:

- Meet with staff on current processes within employee management in Skyward and possibly develop more efficient processes.
- Review and revise "New Position Request" form.
- Develop procedures for employee management when adding, changing, or eliminating a position in maintaining an accurate position inventory.
- Train end-users on new procedures.

Evaluation:

Position Control within Skyward provides current and accurate positions and vacancies for each school and department.

Professional Development Aligned with this Objective:

N/A

Budget: (No current budget items included for this goal.)

Description of Resources	Funding Source	Available Amount	
			Total:
Technology			
Description of Resources	Funding Source	Available Amount	
			Total:
Professional Development			
Description of Resources	Funding Source	Available Amount	
			Total:
Other			
Description of Resources	Funding Source	Available Amount	
			Total:
			Final Total:

FINAL BUDGET (Insert Rows as Needed)

Evidence-based Program(s)/Material(s)			
Goal	Description of Resources	Funding Source	Available Amount
-	-	-	-
			Total:
Technology			
Goal	Description of Resources	Funding Source	Available Amount
			Total:
Professional Development			
Goal	Description of Resources	Funding Source	Available Amount
			Total:
Other			
Goal	Description of Resources	Funding Source	Available Amount
-	-	-	-
			Total: \$0
			Final Total:

IMPLEMENTATION EVALUATION

Describe plans for ongoing and final evaluation on the extent of successful implementation of the division improvement plan and other division improvement efforts.