



# **Southern Lehigh School District**

## **Business and Human Resources Departments**

### **Plan for 2014-15**

## **Goals for Growth, Improvement, Enhancement**

Leah M. Christman, Superintendent

Jeremy Melber, Director of Business Services

William Kennedy, Human Resources Administrator

Greg Martin, Coordinator of Food Services

Andrea Scherzberg, Accountant

Deneen Carerras, Coordinator of Payroll, Benefits and HRIS

## A Message from our departments:

Dear Southern Lehigh Community:

The Business and Human Resources Departments would like to inform you that for the next few years our departments will continue to be engaged in a continuous improvement planning process which will focus on our District goals:

- **HIGHLY QUALIFIED TEACHERS AND STAFF (HQ)**
  
- **IMPROVED INTERNAL AND EXTERNAL COMMUNICATIONS (IC)**
  - **Business Department:** Full Accounting electronic alignment: A complete automatic alignment of all three financial data centers will allow for a quick balance of all accounts, and will allow staff to see utilization of budgeted amounts faster and more efficiently.

In many ways, our Department Plan will serve as our road map for continued success. Our plan, which is supported by research-based strategies, will focus on *creating a culture of innovation and creativity empowering students for a brighter future in a global society*. Because your input and support are needed, we invite you to join us as we work to make our school district better.

Sincerely,

The Business Department and Human Resource Department Administrators

Committee Members/Representatives – ALIO Committee

Committee Meetings

Name	Position
Jeremy Melber	Admin. (R)
Deneen Cararras	Admin. (R)
Melinda McComber	Secr. (R)
Bill Kennedy	Admin. (R)
Andrea Scherzberg	Admin (R)
Technology Department Rep	R
ALIO Rep	R
TalentEd Rep	R
Administrators	A,R,S
Greg Martin	Admin (R)

Date	Time	Location
7/25/14	AM	Bus/HR Offices
8/8/14	AM	Bus/HR Offices
8/10/14	PM	Bus/HR Offices
10/3/14	AM	Bus/HR Offices
10/24/14	AM	Bus/HR Offices
11/5/14	AM	Bus/HR Offices
12/19/14	AM	Bus/HR Offices
1/8/15	AM	Bus/HR Offices
1/23/15	PM	Bus/HR Offices
2/28/15	PM	Bus/HR Offices
3/14/15	PM	Bus/HR Offices
3/28/15	PM	Bus/HR Offices

Position codes noted as follows:

- A= Building Administrator
- B = Business Partner
- P = Parent
- R = Related Services and/ or Support Staff
- T = Teacher
- S = Special Education Representative

Please note: This table includes initial dates for the full Department Planning Team. These meetings will be used to develop, refine, and monitor progress toward meeting the target plan. indicators and implementation of strategies outlined in the Sub-committee meetings and other occasions when the plan may be discussed are not included

**I. Needs Assessment**

Results from standardized data indicators and other data indicators were compiled, reviewed and analyzed, where appropriate, as part of our needs assessment process. The data indicators listed below (list those that were used to identify needs) were reviewed as part of this process. Please note that an asterisk (\*) indicates information we viewed as most important in our needs assessment process. As a result of the team’s review of the data, analyses, and discussions, and keeping in mind the Southern Lehigh School District Strategic Plan, we were able to identify needs and to develop corresponding Goals (selected by each school or department) and strategies tied to each of our identified needs. The goals and strategies represent data that can be tracked on a periodic basis.

<b>Data Indicators</b>	
Performance reviews that are indistinguishable from others given, with no evaluative criteria addressed	Time spent in contact with staff to answer financial questions
Input will be sought from both administrators and non-exempt employees to determine changes necessary for a meaningful interaction	Reduction in time spent to balance accounts with Alio
Financial Records & Reports / Alio Data	Effectiveness of downloading bank statements into new system
Questions asked about the hiring process	Time spent in account reconciliation
Problems encountered by teachers and administrators that involve poor communication, written or verbal	Investment Report structure
Financial web Page contacts x number	Suggestions made to improve communications by teachers that have experienced the process
Treasurer’s Report structure	

## II. Data Indicators

ACADEMIC PROFICIENCY (AP)	HIGHLY QUALIFIED STAFF (HQS)	IMPROVED INTERNAL AND EXTERNAL COMMUNICATIONS (IC)
	<p>Level of satisfaction reached in the opinion of individuals hired through District processes</p> <p>Level of comfort during the process with shared knowledge of the steps in hiring.</p> <p>Success level felt by individual teachers hired in onboarding and Board approval timing.</p> <p>Number and quality of evaluative factors listed by administrators for non-exempt evaluation</p> <p>Relative ease of evaluative process. For non-exempt individuals</p> <p>Non-exempt goals</p>	<p>Decrease in time to balance all three financial data systems by having electronic reports work together to verify balances or differences for each monthly account.</p> <p>Quicker access of revenue accounting by accountant having immediate access to deposit information by the Business Director.</p> <p>Actual access contacts of financial website information pages for AFR, Budget, Act 1, and other District financial information.</p> <p>Efficiency (ability to access by %) of District financial website</p> <p>Use the information obtained from the Alio reports to make better decisions regarding ordering and menus, per building. Input from individuals hired during the last three years will e evaluated for “bumps in the road” that are communication-based</p> <p>Opportunities for Administrators to serve on committees and gain input and influence in processes they will use every year.# of questionnaires sent and replied to</p> <p>Non-exempt goal-setting according to departmental priorities</p>

**III. Strategic Plan Goals Linked to Needs and Goals/Instructional Strategies**

- **Objective 2: HIGHLY QUALIFIED TEACHERS and STAFF:** All educators will be rated highly qualified as defined by the Pennsylvania Department of Education: Hold at least a bachelor’s degree; hold a valid PA teaching certificate (not an emergency permit); demonstrate proficiency as measured by the Educator Effectiveness Program 82-1, 82-2, or 82-3 ratings. All other staff will be rated highly qualified by holding appropriate credentials, experience, and annual ratings as proficient or above.

<i>Identified Need</i>	<i>Goal</i>	<i>Strategies</i>	<i>Related Professional Development</i>	<i>How Will We Assess Implementation</i>	<i>What Will We Look for as (Student) Results?</i>
<u>Human Resources:</u> Input from Administrators will be analyzed to create Process by which non-exempt employees may be successfully evaluated and set annual goals in line with departmental priorities	Improved form for non-exempt personnel evaluation and goal-setting in use in 15-16.	HR will coordinate meetings with a committee of Administrators to revise form.	None at this time	Form will be introduced and in effect in 15-16.	Each non-exempt employee will be successfully evaluated; new form and goals set for the 15-16 school year
<u>Human Resources:</u> Inspection of the hiring process with attention to improvement	Improvement in the hiring process as perceived by hired individuals	Poll each individual hired in the last 3 years and gauge their feelings concerning communication, ease of onboarding and overall experience with a questionnaire with a linear measurability	None at this time	We will look at the measures in the questionnaire to evaluate problem areas.	If necessary, the hiring process will be improved accordingly.

### III. Strategic Plan Goals Linked to Needs and Goals/Instructional Strategies

**Objective 3: IMPROVED INTERNAL AND EXTERNAL COMMUNICATIONS:** Stakeholder satisfaction of school communications will improve by 5% each year as measured by perception data collected through quantitative and qualitative questionnaires.

	<i>Identified Need</i>	<i>Goals</i>	<i>Strategies</i>	<i>Related Professional Development</i>	<i>How Will We Assess Implementation</i>	<i>What Will We Look for as Results?</i>
	<u>Business Office:</u> Lack of communication and teamwork through processes that in turn creates errors and time wasting work.	Increase work performance office wide by creating better communication skills and working together as a team to work more diligently and efficiently.	<ul style="list-style-type: none"> <li>-Have monthly team meetings to discuss past performance and create and analyze strategies for improvement</li> <li>-Review quarterly work performances and discuss staff behavior with individuals on what processes were slowed by poor communication.</li> <li>-Coordinating schedules so work flow processes are done in timely manners in respect to certain reports and processes that rely on one another.</li> <li>-Create atmosphere where only positive and productive attitudes will be tolerated.</li> </ul>	Training to staff to coordinated schedules on the processes that they have lead control over, so the people and process that rely on those specific tasks can be cross trained as well as done in specific order of deadlines so no time is wasted.	Staff meetings that are conducted will be tracked using google docs, and the amount of time conflicts and mistakes will need to be decreased from month to month, which will show a successful pattern.	<ul style="list-style-type: none"> <li>-A positive atmosphere and working environment.</li> <li>-Increase productivity or work processes.</li> <li>-Less mistakes through cross sectioning work flow patterns.</li> </ul>
	<u>Business Office:</u> Financial information for the school district is not easily accessible or readable without contacting business office staff.	By the end of all financial related meetings and presentations, information will be made through reports from the business office on the department's website.	<ul style="list-style-type: none"> <li>*Reformat the webpage to allow for posting of updated financial documents in a user friendly format.</li> <li>*By the time the Budget and Finance committee begins holding budget meetings, initial information will be posted online.</li> <li>*Throughout the budget process, documents will be updated and new materials posted.</li> <li>*Other relevant financial information will be placed on the website as it becomes available. (e.g. tax collector information, tax billing information)</li> </ul>	The technology department will be utilized to train the Business Office in advanced website creation. Training sessions will be conducted by the Director of Business Services to enable building administrators to access financial website information	<p>A monthly district report will be compiled showing all updated news from the business office staff.</p> <p>All necessary financial documents will be relocated to the website.</p> <p>Baseline data on website traffic will be gathered for future use</p>	Evidence that financial pages have been created and informational reports posted.
	<u>Business Office:</u> Relying on District Accountant for financial information for each building cafeteria.	Gain a better understanding of the financial well-being of the Food Service Department.	By December 20, 2014, learn how to access the Alio financials and reporting system.	<p>Attend the Alio conference and meetings.</p> <p>Attend the PASBO conference</p>	<p>Alio financial Reports.</p> <p>Inventory sheets.</p>	<p>Number of reports that can be obtained without requesting them from the District Accountant.</p> <p>Ability to analyze the financial data included in the reports.</p>

<p><b>Food Service:</b> To streamline the catering guide, catering order form, and how catering is ordered for events by the end of the 2014-2015 school to increase efficiency.</p>	<p>Then customers would be better informed of what the items they chose will cost, catering billing would be timelier and a lot closer to the actual date of the event.</p>	<p>This would result in customers knowing exactly what they're being charged, not having to wait to settle their debt and invoice credits to the Food Service Department being expedited. Business office doesn't have to follow up on catering invoices being credited to the food service department.</p>	<p>None at this time</p>	<p>We will look at the measures in the questionnaire to evaluate problem area</p>	<p>If necessary, the hiring process will be improved accordingly.</p>
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**IV. Plan Development and Dissemination Process**

We used a process in developing our comprehensive plan and involved many individuals in order to ensure that it addressed the needs of all our students, staff, or department. Below you will find a very brief summary of how we ensured that many individuals (beyond the members of our planning team) were involved in the development of our plan. Also, we are outlining how we will present our plan and our school's performance to our stakeholders.

**How Individuals Beyond Team Members Were Involved in Developing Our Plan**

It was necessary to involve many other administrators who were or would become stakeholders in all goals mentioned. We sought advice from the Superintendent, the Assistant to the Superintendent, various Administrators and functional Coordinators, and the Technology department concerning the suitability and structure of online informational systems and web pages, training video content and presentation, banking concerns with various accounts and District needs. Administrators from other districts were consulted concerning online services vendors in the selection process. Once selection was effected, representatives from the online services were involved in matters of switchover and training as well as system features and their implementation.

**Methods Used to Communicate Our Plan**

Our Plan will be posted upon the District website for access by all interested parties. Different portions will be communicated to stakeholders by email, employee meetings, and training sessions.



**V. Needs Assessment: School-wide Staff Development Focus**

Based on our staff development needs assessment survey results, along with team member discussions, the following staff development opportunities will be provided. They are linked directly to our Data Indicators and Goals/ Strategies and corresponding strategies.

<b>Staff Development 2012-2013</b>			
<i>Topic</i>	<i>Timeline</i>	<i>Participants</i>	<i>Documentation such as Attendance Logs, Agendas, etc.</i>
Software training	Aug/Sept	Payroll Staff	
Software training	Oct/Nov	Administrators	
Software training	February	Employees	