

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

Strategic Plan

Statement of Issue: *Why?* Continued improvement through collaboration, accountability, transparency, and innovation.

Statement of Goal: *What?* Alignment of fiscal, technological, and physical resources to accomplish District initiatives.

Innovation Area Finance, Technology, and Maintenance & Operations Date to be Completed: Ongoing Responsible Party: Beth Strickler

Tactical Plan of Action

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
Finance						
Goal 1: Maintain District solvency with budgets that support Board goals, District priority, and District policies.	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	03/01/2022 - 06/30/2026	Yearly stakeholder meetings to review the new fiscal year expenditure budget.
Goal 2: Generate a balanced budget to include sufficient carry-over.	A. Implement and maintain a sustainable budget.	Director of Business Services & Technology	Budget Accounting Specialist Director of Business Services & Technology	N/A	05/01/2022 - 10/15/2023	Carry Forward amount represented on the BUDG75 report after AFR submission.
Goal 3: Design a District-wide capital acquisitions plan.	A. Compile detailed information, obtained from necessary supervisors. B. Implement a capital item purchasing timeline.	Director of Business Services & Technology	Site Administrators Building and Grounds Supervisor Technology Supervisor	TBD	03/01/2023 - 05/31/2023	Capital acquisition plan developed and implemented for a continuous 5-year look-a-head.
Goal 4: Construct a comprehensive grants program.	A. Design an entitlement & grants program that will enable the District to secure and utilize additional funding.	Grants Coordinator	Grants Coordinator Director of Business Services & Technology	N/A	01//04/2022 - 06/30/2023	Funds allocated for entitlement and competitive grants to allow for greater District reserves of public funds.

Statement of Issue:

Continued improvement through collaboration, accountability, transparency, and innovation.

Statement of Goal:

Alignment of fiscal, physical, and technological resources to accomplish District initiatives.

Objectives –Sub Goals	Critical Work Activities (CWA)	Responsible Person(s)	Resource Required	Cost	Completion Date	Evidence of Accomplishment
<p>Goal 5: Convene an advisory committee (group) to spend funds more wisely.</p>	<p>A. Open discussion on ways to save funds. (Purchasing Cooperatives, discount retailers, school printing, etc.).</p>	<p>Budget Accounting Specialist</p>	<p>Certified Employee (s) Classified Employees (s) Community Stakeholders Budget Accounting Specialist Building & Grounds Supervisor Technology Supervisor Grants Coordinator Director of Business Services & Technology</p>	<p>N/A</p>	<p>07/01/2022 - 06/30/2026</p>	<p>Quarterly meetings.</p>
<p>Goal 6: Generate a thorough guide of business office procedures.</p>	<p>A. Create an FAQ / checklist for school use on the District requirements for purchasing (Req’s, PO’s, packing slips, etc.). B. Assemble a Student Club Advisors Handbook (distribute & training). C. Create a “Transacting with the Business Office” handbook, explaining office procedures & office positions.</p>	<p>Budget Accounting Specialist Director of Business Services & Technology</p>	<p>Budget Accounting Specialist Accounts Payable Specialist Payroll Accounting Specialist Director of Business & Technology</p>	<p>N/A</p>	<p>A. 11/01/2021 - 11/30/2021 B. 11/01/2021 - 12/19/2021 C. 12/01/2021 - 06/30/2022</p>	<p>FAQ/checklist distributed and utilized. Published handbooks for: 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>

Statement of Issue: Continued improvement through collaboration, accountability, transparency, and innovation.

Statement of Goal: Alignment of fiscal, physical, and technological resources to accomplish District initiatives.

Objectives –Sub Goals	Critical Work Activities (CWA)	Responsible Person(s)	Resource Required	Cost	Completion Date	Evidence of Accomplishment
Technology						
Goal 1: Maintain and support IT department goals, objectives, and initiatives.	<ul style="list-style-type: none"> A. Create a modern and comprehensive technology department structure. B. Create and maintain a technology end of life and reuse plan. C. Writing IT section in monthly district newsletter. D. Quarterly cabinet reports. 	Technology Supervisor	Technology Department	Salaries & Benefits required for positions	01/01/2022 – 06/30/2026	<ul style="list-style-type: none"> Governing Board Presentation of completed structure and plans. Quarterly cabinet reports. Monthly district newsletter.
Goal 2: Streamline and modernize District operations through integrations, systems automation, and enhanced security.	<ul style="list-style-type: none"> 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 they meet district needs. D. Design a technology integration guide. E. Evaluate District print and copy model, with the goal of reducing costs. 	Technology Supervisor	<ul style="list-style-type: none"> Technology Technician I Technology Technician II Technology Supervisor Director of Business Services & Technology 	N/A	<ul style="list-style-type: none"> A. 07/01/2022 – 10/31/2022 B. 08/01/2022 – 10/01/2022 C. 05/01/2022 – 06/15/2022 D. 01/01/2023 – 03/31/2023 E. 07/01/2023 - 12/31/2023 F. 12/31/2022 – 01/01/2023 	<ul style="list-style-type: none"> Decline in helpdesk tickets. Board and Insurance company approved plan. Publication of a comprehensive list of digital communication needs. Publication of the integration guide. Cabinet presentation of viability. Cabinet presentation of evaluation findings.

Statement of Issue:

Continued improvement through collaboration, accountability, transparency, and innovation.

Statement of Goal:

Alignment of fiscal, physical, and technological resources to accomplish District initiatives.

Objectives –Sub Goals	Critical Work Activities (CWA)	Responsible Person(s)	Resource Required	Cost	Completion Date	Evidence of Accomplishment
	F. Evaluate the need for a central analytics platform.					
Goal 3: Restructure, maintain, and provide support/training for Student Information Systems (SIS) and Digital Records.	<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>	Technology Supervisor	<p>Infinite Campus Users</p> <p>Technology Technician I</p> <p>Technology Support Specialist</p> <p>Technology Technician II</p> <p>Technology Supervisor</p> <p>Director of Business Services & Technology</p>	\$40,000 - \$50,000/Year	<p>A. 03/01/2022 – 04/30/2022</p> <p>B. 10/01/2022 – 12/31/2022</p> <p>C. 09/01/2022 – 10/01/2022</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>
Goal 4: Provide excellent customer service, staff support, and training.	<p>A. Create a Technology Support Specialist.</p> <p>B. Create and maintain a comprehensive technology onboarding and training plan.</p> <p>C. Communicate available tools on the IT department tab of the District website.</p>	Technology Supervisor	<p>Technology Technician I</p> <p>Technology Support Specialist (New)</p> <p>Technology Technician II</p> <p>Technology Supervisor</p> <p>Director of Business Services & Technology</p>	\$40,000 - \$50,000/Year	<p>A. 03/01/2023 – 04/30/2023</p> <p>B. 07/01/2022 - 09/01/2023</p> <p>C. 05/01/2022 - 06/15/2022</p>	<p>Successful onboarding of the Technology Support Specialist.</p> <p>Implementation of trainings utilizing a shared calendar (7/1/2023).</p>

Statement of Issue:

Continued improvement through collaboration, accountability, transparency, and innovation.

Statement of Goal:

Alignment of fiscal, physical, and technological resources to accomplish District initiatives.

Objectives –Sub Goals	Critical Work Activities (CWA)	Responsible Person(s)	Resource Required	Cost	Completion Date	Evidence of Accomplishment
Goal 5: Establish a central Project Management platform.	A. Deploy a project management solution such as (Microsoft Projects, ZOHO, or Salesforce).	Technology Supervisor	Building and Grounds Supervisor	\$5,500/Year	10/1/2022 – 06/30/2022	Project snapshots (Progress and completion reports).
		Building and Grounds Supervisor	Technology Supervisor Director of Business Services & Technology			
Maintenance and Operations						
Goal 1: Maintain and support Maintenance & Operation department goals, objectives, and initiatives.	A. Create a comprehensive maintenance and operations department structure. B. Generate and sustain a tools/machinery end of life and reuse plan. C. Write a Maintenance & Operations section in the monthly newsletter. D. Quarterly cabinet reports.	Buildings and Grounds Supervisor	Mechanical Maintenance	Salaries & Benefits required for positions	01/04/2022 - 06/30/2026	Governing Board Presentation of completed structure and projects. Provide a detailed list for end of life & re-use plan to Governing Board. Quarterly cabinet reports. Monthly district newsletter.
			Lead Custodians			
			McKinney Vento Liaison			
			Maintenance / Bus Driver			
Goal 2: Ensure working facilities that are clean and safe for the learning environment as well as be aesthetically pleasing to foster student recruitment.	A. Maintain a comprehensive list of interior checks and balances. B. Prepare a detailed list of interior projects and corresponding completion dates.	Buildings and Grounds Supervisor	Mechanical Maintenance	N/A	07/01/2021 - 06/30/2026	Complete projects in a timely manner. Provide the Governing Board with complete listings for inter, exterior & groundskeeping needs.
			Lead Custodians			
			Landscaper			

Statement of Issue: Continued improvement through collaboration, accountability, transparency, and innovation.

Statement of Goal: Alignment of fiscal, physical, and technological resources to accomplish District initiatives.

Objectives –Sub Goals	Critical Work Activities (CWA)	Responsible Person(s)	Resource Required	Cost	Completion Date	Evidence of Accomplishment
	<p>C. Prepare a detailed list of exterior projects and corresponding completion dates.</p> <p>D. Evaluate building square footage to determine appropriate custodial personnel needed.</p>		Buildings and Grounds Supervisor			<p>Quarterly review of classroom cleaning.</p> <p>Report on total/per person to cabinet.</p> <p>Social Media and Monthly Newsletter postings on project completions.</p>
Goal 3: Provide clean, safe, and reliable student transportation.	<p>A. Establish a transportation vehicle service plan.</p> <p>B. Implement Vehicle Service Plan.</p> <p>C. Train drivers using guidelines set forth by The Trust.</p>	<p>Mechanical Maintenance</p> <p>Maintenance / Bus Driver</p>	<p>Maintenance / Bus Driver</p> <p>McKinney Vento Liaison</p> <p>Buildings and Grounds Supervisor</p>	<p>TBD/Initial Year (\$20,000/year)</p> <p>Annually \$8,000.00</p>	07/01/2022 - 06/30/2026	<p>Completed Plan.</p> <p>Quarterly review of transportation vehicle records.</p> <p>Reduction in unplanned service.</p>

Statement of Issue: Continued improvement through collaboration, accountability, transparency, and innovation.

Statement of Goal: Alignment of fiscal, physical, and technological resources to accomplish District initiatives.

Objectives –Sub Goals	Critical Work Activities (CWA)	Responsible Person(s)	Resource Required	Cost	Completion Date	Evidence of Accomplishment
-----------------------	--------------------------------	-----------------------	-------------------	------	-----------------	----------------------------

DRAFT