Board
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MONTH DUE	ITEM NO.	Date Due	FINANCIAL PLANNING AND MANAGEMENT EVENTS FOR ACTION	Superintendent	Principals	Financial Services	Other
						DIVISION RESPONSIBILITY	
July-18	1	7/23/18	Submit Preliminary FY'19-20 Comprehensive Educational Financial Planning and Management Calendar to Demographics and other departments for revisions.			X	
August-18	2	8/9/18	Community Forum for 19-20 Budget Priorities.			X	
	3	8/28/18	Submit Final FY'19-20 Comprehensive Educational Financial Planning and Management Calendar to Board of Education for approval	X		X	**Board**
	4	8/28/18	Submit FY 2018-19 Tax rates for Board Approval	X		X	**Board**
	5	8/21/18	Fifth Day Adjustment for FY 2018-19			X	**Demographics**
	6	8/31/18	Superintendent receives FY'18-19 preliminary summary of Working Budget for review			X	
September-18	7	9/1/18 9/15/18	**USING DATA TO IDENTIFY UNMET NEEDS LEADING TO GOALS AND PRIORITIES** Superintendent and the chiefs establish recommendations for Board consideration for 2019-20 based on needs assessments, schools' performance matrices (including MAP), and community feedback.	X		X	**Chiefs**
	8	9/15/18 11/2/18	**USE GOALS AND PRIORITIES TO DETERMINE STRATEGIES** Based on the outcome of the determinations of the Superintendent and his chiefs, the divisional administrative teams will convene. Within each division, division chiefs and their department heads will further explore and define the unmet needs for completion of Vision 2020. These administrative teams will also look internally to identify existing budget components for possible elimination due to ineffective, marginal, or unproven items. The division chiefs will be provided a tool to facilitate the prioritization process for the 2019-20 budget.				**Chiefs and their Dept. Heads**
	9	9/12/18	Work session provided to Board for review of FY 18-19 Working Budget			X	**Board**
	10	9/12/18	Board discusses preliminary budget projections, funding priorities and provides feedback to Superintendent and cabinet on the most essential components for fulfilling Vision 2020.			X	**Board**

Board ▨ (orange)
Schools ▨ (cyan)
Divisions ▨ (yellow)

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				Superintendent	Principals	Financial Services	Other
September-18 (continued)	11	9/12/18	Send room use surveys to schools and update school program and optimal capacity based on school survey results.				**Demographics**
	12	9/25/18	FY'18-19 official Working Budget submitted to Board of Education on current tax revenue projections.	X		X	**Board**
	13	9/28/18	Working Budget sent to Division of Finance, Kentucky Department of Education **Regulatory deadline for KDE submittal - September 30th.**			X	
	14	9/30/18	State Department of Education provides District with tentative FY'18-19 SEEK Revenue projection			X	
October-18	15	10/8/18	Receive first pupil month report from Pupil Personnel Dept. and update projection database.				**Demographics**
November-18	16	11/2/18	**MAKING THE DIFFICULT DECISIONS WITHIN DIVISIONS** Department Heads and Division Chiefs conclude their in-depth analysis of unmet needs for completion of final leg of Vision 2020. These divisional administrative teams will prioritize needs and finalize priorities among new items, end of cycle items, and existing programs under review.				**Chiefs and their Dept. Heads**
	17	11/2/18 11/15/18	**SUBSEQUENT CONVERSATION AMONG CHIEFS AND SUPERINTENDENT CENTERED ON DIVISIONAL STRATEGIES** Superintendent and Division Chiefs reconvene in order to produce list of top priorities for Board consideration for the completion of the final leg of Vision 2020.	X		X	**Chiefs**
	18	11/13/18	Develop district-level and school-by-grade projection drafts based on (1) trend data on actual enrollment vs projections and (2) capacities based on room use surveys				**Demographics**
	19	11/15/18	**INITIAL RECOMMENDATIONS TO THE BOARD ON STRATEGIES TO BE SUPPORTED IN 2019-20** Superintendent submits top priorities for Board Work Session Items are not yet enterered into Investment Tracking System, but final list is hinged on Board feedback.	X			
	20	11/27/18	Review of District/Board Priorities for 19-20. Board finalizes funding priorities for 2019-20	X		X	**Board**
December-18	21	12/8/18 1/4/19	**CAPTURING AND QUANTIFYING THE** **What is JCPS able to eliminate in order to support the**				

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			higher priorities that have greater impact on measured student achievement?				
December-18 (continued)	21 (cont.)	12/8/18 1/4/19	**What are the items that JCPS is able to redefine or hone in order to be more purposeful, relevant, and impactful?** 1.) Identify items to convert to Competitive Offerings for schools that may include new as well as previously existing programs. 2.) Convey to Finance which NEW priorities may be entered into Investment Tracking System. 3.) Identify which End-of-Cycle Items need to be sustained and which ones must be deleted. 4.) Identify other programs that are marginal or ineffective through the evaluation process, and eliminate them or re-focus them.			X	**Chiefs and their Dept. Heads**
	22	12/8/18 1/4/19	New goals and cycles to be completed for End of Cycle Items designated for sustainment. Possible small tweaking of strategies for those that pre-existed and that have already been deemed sustainable.	X	X		**Cost Center Heads Planning and Evaluations Dept.**
	23	12/11/18	Revenue and expense projections for Draft Budget FY'19-20 presented to the CFO.			X	
	24	12/11/18	Send school enrollment projection drafts to principals for feedback and adjustments		X		**Demographics**
	25	12/12/18	Approve Annual Comprehensive District Improvement Plan				**Board**
January-19	26	1/5/19 1/15/19	Review data to be added to items by Systems Improvement Department as well as submitting cost center heads. This action is for new proposals and End of Cycle items.				**Planning and Evaluations Dept. Cost Center Heads**
	27	1/8/19	Board and Superintendent receive overview of Draft Budget at Work Session	X		X	**Board**
	28	1/11/19	Budget Department to provide departmental budgets for on-line distribution by departments.			X	**Chiefs and Dept. Heads**
	29	1/14/19	Principals given projected enrollment for FY '19-'20 including information on 'Pre-School and ECE		X		**Demographics**
	30	1/16/19	Title I Free and Reduced Count taken to determine Title I allocations for schools				**Title I Director**
	31	1/22/19	Board of Education receives and approves FY'19-20 student enrollment projections	X			**Board**
	32	1/22/19	Board of Education receives the Draft Budget for FY 2019-20, enrollment projections, and School Allocation Standards.	X			**Board**

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				DIVISION RESPONSIBILITY			
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			Deadline for Board review of Draft Budget is January 31st.				
January-19 (continued)	33	1/22/19	Budget Department receives enrollment data for FY 2019-20 from Demographics				**Demographics**
	34	1/23/19	Tentative program placements made at schools by program directors, including Pre-School, ECE, ESL, and others.				**Program Directors**
February-19	35	2/1/19 2/12/19	**MAKING THE FINAL BOARD RECOMMENDATIONS** Superintendent and Chiefs make final budget recommendations based on prioritization, proposals in the Investment Tracking System, and resource availability.	X		X	**Chiefs**
	36	2/5/19	Staffing and budget data sent to special schools in District - TAPP, Minor Daniels Academy, Breckinridge Metro, Liberty H.S., Brown, Churchill Park, etc.			X	
	37	2/5/19	Each School receives site-based budget allocations for FY 2019-20. Regulatory deadline is March 1st.				
	38	2/5/19	Title I sends schools tentative budget allocations				**Title I Director**
	39	2/5/19 3/15/19	Principals and SBDM Committee meet to make decisions on school-based allocations, staffing, and other fund sources.		X	X	
	40	2/5/19 3/15/19	Bookkeeper and/or clerk and principal input site-based flex funds (section 6) into the FY'19-20 MUNIS Next Year Budget Entry		X	X	
	41	2/5/19 3/15/19	Schools submit position changes to Budget Department. March deadline for council changes (see Budget Instructions)		X		
	42	2/12/19	Training for new principals on budget.		X	X	
	43	2/12/19	Continue monitoring and processing final approvals of student applications in view of projected enrollment, capacity, and diversity guidelines.				**Demographics**
	44	2/13/19	**FINALIZING THE DIFFICULT DECISIONS** Submit final budget recommendations for Board review prior to final approval.	X		X	
	45	2/26/19	Board approves final recommendations of new-year budget priorities AND End of Cycle Programs to be sustained. Board also receives list of declined items, and End of Cycle Programs not to be sustained.	X		X	**Board**

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February-19 (continued)	46	2/28/19	Notify cost center heads of approvals			X	
March-19	47	3/15/19	Deadline for schools to input FY'19-20 flex budget into on-line Distribution System. Deadline for school councils' decisions on staffing with next opportunity for changes on August 1st.		X		
	48	3/28/19	Tentative Budget submitted to the Superintendent for review			X	
April-19	49	4/23/19	Superintendent submits to the Board of Education the Tentative Budget for work session	X		X	**Board**
	50	4/25/19	Deadline for Principals to submit Activity Fund Budgets		X		
	51	4/30/19	Principals submit textbook purchase plans, including Council approvals (if applicable).		X		
May-19	52	5/22/19	Board adopts Tentative FY'19-20 Budget Including Activity Fund budgets submitted by principals				**Board**
	53	5/29/19	Schools submit textbook purchase plans to District office.		X		
	54	5/29/19	Tentative Budget sent to Division of Finance Kentucky Department of Education **Regulatory deadline for submittal - May 31st.**			X	
August-19	55	TBD	Demographics will provide school enrollment projections as of the 5th student day to Personnel Services and Financial Planning and Management				**Demographics**
	56	TBD	Budget adjustments for elementary, middle, and high schools based on student count on the 5th day after school opens.			X	