

ON-GOING RESPONSIBILITIES							
Audience	Task	Monthly	Quarterly	Yearly	Other	Person Responsible	
District	Evaluate District trainings that effectively resolve issues and conflicts in order to cultivate a safe learning and working environment						
	Evaluate District plan for Diversity recruitment and retention including trainings and initiatives around cultural competence						
	Maintain School Office Staff list						
Department	Review Personnel/HR department budget and expenditures						
	Facilitate regular department meetings						
	Review HR department POG to ensure that activities for the prior month have been completed and to prepare for the current and next month's responsibilities.						
	Review open personnel and labor matters to ensure closure on those which affect the start of school.						
	Review the WSPA web site for upcoming training opportunities and/or additional new information. <a href="http://www.wspa.net">www.wspa.net</a> .						
	Prepare and submit to the Board of Directors a motion and/or updates to policies and procedures to establish compensation, benefits and work schedules (holidays, vacations, leaves, etc.) for non-represented employees.						

	HR administrator conducts evaluations of HR staff as required.						
Labor Relations							
All Staff	Review grievance actions to ensure that all steps have been taken appropriately to process the grievance in accordance with contract requirements						
	Perform terminations (retire/resign spreadsheet, email notification, letters, Business Plus ending pay assignments/HR Code, Term Info., (if Special make appropriate notes and give file to Executive Assistant), files, cards.						
Supervisors	Send reminders to administrators of evaluation responsibilities, due dates, etc						
Evaluation							
Certificated Staff	Continue to review certificated performance progress of employees with all evaluators to determine if assistance is needed and/or employees are in need of notification of performance deficiencies. Share with appropriate personnel.						
	Facilitate student teacher placements						
	Process reasonable assurance letters						
	Prepare overload spreadsheets and distribute						
Classified Staff	Review progress of employees in probationary status. Assist administrators as needed to provide resources and support. Ensure that all steps of the probationary process are being met.						
	Classified Step increases						
	Process classified licenses						
	Schedule and monitor ETS para-pro assessment tests						

	Create classified transfer letters and file in personnel files						
Substitutes	Substitute hiring orientations: Process new hire paperwork, complete/update information for new hires, create personnel file						
	Clean up sub list to determine who gets a letter of assurance						
	Update pay rates, staff, etc. in electronic sub system						
	Substitute tracking: those who call in sick, hours worked, document restrictions from buildings, etc.						
	Substitute orientations						
	Post classified substitute and substitute teacher positions						
Supplemental Pay	Send Extracurricular spreadsheets to Extracurricular Building Leaders, Athletic Coordinators, & Athletic Directors; process extracurricular payments						
	Process supplementals and issue contracts						
	Check/audit monthly stipends/supplementals						
Hiring	Process new hires: create personnel files, gather documentation, provide trainings, etc.						
	Assign/schedule new hire orientation/onboarding for new staff						
PD/Training							
Data Collection							
Fiscal							
Misc.							

<b>JANUARY</b>							
Audience	Task	Notes	Quarterly	Yearly	Other	Person Responsible	Completion Date
Federal/State Deadlines							
District Deadlines							
District							
Department	Update forms as appropriate for the year and order.						
	Review upcoming expenses for recruitment activities.						
	Change dates for HR processes						
	Begin review of processes for upcoming year						
Labor Relations	Determine composition of district collective bargaining agreement team(s) as needed and begin the schedule development for sessions.						
All Staff							
Supervisors	Meet with principals/supervisors to review next year staffing projections and confirm forecasted enrollment and staffing allocations.						
	Schedule Involuntary Transfer Meeting (location, time)						
Evaluation							
Certificated Staff	Coordinate administrative internship application materials.						

	Continue to review staffing based on monthly enrollment reports. Work with other departments, principals and site administrators to adjust enrollment as necessary, particularly for second semester secondary staffing						
	Prepare reports to compare planned second semester staffing and mid-year actual staffing to plan and budgeted staffing FTE.						
	Send reminder letters on expiring certificates, licenses and required training to staff.						
	Prepare staffing spreadsheet and allocate to building.						
	Continue to make changes to the S 275 report in preparation for February or March submission.						
	Check OSPI for disciplinary certs						
	Update Certificated Seniority list for webpage (Per CBA and/or district procedure)						
	Prepare preliminary staffing projections, estimate all FTE and budget costs, and check staffing allocations. (NOTE: Be aware of legislative changes.)						
Classified Staff	Review classified performance progress of employees with all evaluators to determine if assistance is needed and/or employees are in need of notification of performance deficiencies. Prepare a report for the Superintendent of the status of employee performance.						
	Classified staffing.						

	Create dates of employment/calendars for classified ten-month employees						
Substitutes	Review substitute rosters to determine if additional recruitment activities are needed to add substitute and/or temporary staff to rosters to meet the typically heavier upcoming leave						
Supplemental Pay							
Hiring	Schedule Career Fair functions, process registrations, schedule, and make travel arrangements						
	Provide announcements to applicants and colleges/universities as appropriate.						
	Attend recruitment events.						
	Review hiring procedures with management team and appropriate staff.						
	Continue with Career Fair Coordination (date, location, persons attending, etc.)						
	Plan for hiring season.						
	Post early hire pools (Certs)						
PD/Training							
Data Collection							
Fiscal	Begin review of budget guidelines and budget activities calendar for the upcoming school year.						
	Continue budget development and staffing planning for the upcoming school year, entering data into database systems as appropriate to reflect changes. Continue meeting with site and department administrators to review staffing needs and allocations.						

	Process sick leave cash out for employees. Modify the S 275 report data to reflect cash out data.						
	Begin review of basic education budget guidelines and district budget activities calendar for the upcoming school year						
Misc.	Audit and review quarterly reports for workers' compensation and unemployment benefits. Take action as necessary to return workers to their positions and/or process claims.						
	Submit OSHA 300 Log to Department of Labor.						

<b>FEBRUARY RESPONSIBILITIES</b>							
Audience		Notes	Quarterly	Yearly	Other	Person Responsible	Completion Date
Federal/State Deadlines							
District Deadlines							
<i>District</i>	Begin district personnel budget preparations for the upcoming school year. Obtain forecasted student enrollments and convene staffing and finance team to review preliminary data and discuss early hiring plans. Reports based on preliminary known data.						
<i>Department</i>	Review departmental goals.						
	Determine WSSDA/WASA legislative conference attendance.						
	Determine if any data is needed to support upcoming negotiations, including preparation and completion of surveys to collect salary, benefits or other data.						
	Update HR Department internal procedures.						
	Review summer vacation schedules with HR department staff.						
	Prepare and Submit to Labor Relations Director for review the "Are you Returning" correspondence to one-year leave employees						
	Review HR special projects for the year.						
<i>Labor Relations</i>							
<i>All Staff</i>							



<i>Supervisors</i>	Communicate with principals/staff for potential transfers, intent to return, educational advancement, etc. for next year as part of the continued staffing planning work.						
	Review involuntary transfer plans with supervisors. Meet with affected employees and complete transfer processes as necessary. Provide support to transferred staff to plan move of their						
<i>Evaluation</i>							
<i>Certificated Staff</i>	Check performance of provisional contract employees to determine eligibility for continued employment.						
	Pull a random set of certificated files. Review credit, degree and experience data to ensure it has been accurately calculated and reported on the 275 report.						
	Reminder to New National Board Recipients to submit certificate						
	Create and finalize Certificated official dates hire						
<i>Classified Staff</i>	Spring coaching contracts						
	Notify all temporary employees of the status of their temporary position.						
<i>Substitutes</i>							
<i>Supplemental Pay</i>	Prepare supplemental forms for elementary and secondary payment prior to the tenth of the month.						
<i>Hiring</i>	Schedule recruitment events.						
	Check schedules of all participants and travel accommodations for recruiting events.						
	Continue with Career Fair Coordination (date, location, persons attending, etc.)						

<i>PD/Training</i>	Begin planning for New Hire Orientations.						
	Set a meeting with Mentors and T & L to plan dates for next year's Novice Teacher PLC's						
	Schedule Fall, Winter and Spring Cooperating Teacher training dates						
	Schedule Student Teacher Training series dates						
<i>Data Collection</i>							
<i>Fiscal</i>	Review the S 275 summary reports (1801, 1803) for accuracy. Obtain and review the 1159 K-4 compliance report. Make adjustments as necessary for submission of an updated 275 report.						
<i>Misc.</i>	Create calendars in Business Plus.						
	Change dates for HR processes						

<b>MARCH RESPONSIBILITIES</b>							
Audience	Task	Notes	Quarterly	Yearly	Other	Person Responsible	Completed Date
Federal/State Deadlines							
District Deadlines							
District							
Department	Begin collective bargaining for all open contracts.						
	If not in a bargaining year, prepare and submit to the Board of Directors an action item to approve salary schedules for represented and non-represented employees specific to your district. If appropriate, recommend compensation adjustments.						
Labor Relations							
All Staff							
Supervisors	Review hiring processes with administrators. Provide training as appropriate.						

	Notify supervisors of upcoming evaluation deadlines. Make final preparations for processing status of employee in probationary status or provisional employees that may not be performing adequately.						
	Begin coordinating Summer School. Push out emails to all principals requesting information on their coordinators and timekeepers (CERT)						
Evaluation							
Certificated	Coordinate intake of admin intern applications.						
	Review and approve admin internship applications prior to state deadline.						
	Work with other units to prepare and post summer school positions.						
	Start preparing letter of assurance for next school year.						
	Communicate with evaluators any concerns for performance plans, RIF's, etc.						
	Mail the "Are You Returning" letters to all one-year leave employees.						

	Continue to prepare staffing allocations for the upcoming school year. Work with Business Services to begin data entry into the database systems to establish the upcoming budget data. Check for changes in account codes and make changes to database accordingly						
	Check certification, licensing or work visas for all staff. Send reminder communications to staff with expiring certificates, licenses or work visas.						
	Summer School prep						
Classified Staff	Check certification, licensing or work visas for all staff. Send reminder communications to staff with expiring certificates, licenses or work visas.						
	Review requirements for spring coaches to ensure they are appropriately qualified.						
Substitutes							
Supplemental Pay							
Hiring	Summer school classified positions posted						
	Continue with Career Fair Coordination (date, location, persons attending, etc.)						
	Involuntary Transfer Meeting (CERT)						
	Post Summer School positions.						

PD/Training	Prepare TPEP course descriptions and find instructors for summer trainings.						
	Begin planning New Admin Orientation mtg. (dates, location, food, agenda, binders, stakeholder input)as needed for the summer						
Data Collection							
Fiscal	Coordinate with Finance to create new salary schedules including any known changes for their projections in accordance with bargaining and minimum wage provisions						
	Update the S 275 reporting data as necessary in preparation for the March submission.						
	Ensure grant applications submitted to state by deadline.						
Misc.							

APRIL RESPONSIBILITIES							
Audience	Task	Notes	Quarterly	Yearly	Other	Person Responsible	Completion Date
Federal/State Deadlines							
District Deadlines							
<i>District</i>							
<i>Department</i>	If necessary, prepare resolutions for approval by the Board of Directors to support a reduction in force (RIF) plan for the upcoming school year.						
	Typically begin negotiation with various units as required by CBAs. Meet with the Board of Directors to establish bargaining parameters.						
	Submit the annual resolutions to employ certificated staff and administrators to the Board of Directors for approval.						
<i>Labor Relations</i>							
<i>All Staff</i>							
<i>Supervisors</i>	Final check of employees on Provisional contract status to determine performance. If problems exist, review with legal counsel if appropriate, and issue non-renewal notice on or before May 15 <sup>th</sup> .						
	Administrator contracts may be issued at a later date but should be issued no later than June 30 <sup>th</sup> of the year.						
	Prepare new administrative Salary Tables						
	Roll Administrative Staff for July						

	Audit Administrative staff with Supervisor of Staffing & Fiscal Reporting						
<i>Evaluation</i>	Notify supervisors of evaluation due dates.						
	Send out evaluation template with reminder to evaluators for consistency.						
	Reminder about upcoming certificated and classified evaluation deadlines.						
<i>Certificated Staff</i>	Finalize letter of assurance for next school year.						
	Push out Summer School Hiring Spreadsheets to all Coordinators (CERT)						
	Follow-up on return from leave letters sent in March						
	Prepare certificated employee contracts for issuance, typically the week after spring break. Contracts may be delayed depending on budget information, legislative action and/or other CBA requirements. This is a good time however to issue contracts if possible to lock employees into the contract for staffing purposes. – Remember, do not mail out May contracts until after edits.						
	Follow-up with employees that were notified of expiring certificates, licenses or work visas to ensure they are taking action to renew appropriately.						
	Update S275 with National Board information						
	Summer School prep work with applicant specialists, payroll & new cert hire specialist						
	Check with records specialist for stipend amount change in National Boards stipend						



	Roll Certificated and Classified staff in preparation for contracts in May (roll degree stipends)						
<i>Classified Staff</i>	Check progress of any probationary status employees; review with attorney.						
	Prepare Reasonable Assurance notices to less-than-12-month classified, certificated and substitute employees. If possible, send an experience record to classified employees so they have an opportunity to review their work experience record with the district. If possible, include return to work date.						
	Follow-up with employees that were notified of expiring certificates, licenses or work visas to ensure they are taking action to renew appropriately.						
	Verify prints with AD's for summer sports camps. (CLASS)						
	Roll Certificated and Classified staff in preparation for contracts in May (roll degree stipends)						
<i>Substitutes</i>							
<i>Supplemental Pay</i>							
<i>Hiring</i>	Attend recruitment events as planned. Review data coming back from recruitment activities. Follow up with applicants and/or administrators to set site visits and/or interview schedules as appropriate.						

	Depending on recruitment activities and budget availability, issue early contracts as a result of recruitment activities.						
	Review applicant pool, particularly for hard-to-fill positions. Conduct additional recruiting as necessary.						
	Certificated summer school positions posted						
	Continue with Career Fair Coordination (date, location, persons attending, etc.)						
	Post certificated summer school positions						
<i>PD/Training</i>	Develop plans for the New Administrator Orientation.						
	Look over previous year's hiring and on-boarding materials and begin to make revisions as necessary.						
	Prepare TPEP evaluation instruction sheet for administrators (print in color, landscape, 8.5 x 11); Send out End of Year Eval training docs;						
<i>Data Collection</i>							
<i>Fiscal</i>	Connect with Payroll & Benefits to become aware of any changes to benefit design that impact bargaining units.						
<i>Misc.</i>							

<b>MAY RESPONSIBILITIES</b>							
Audience	Task	Notes	Quarterly	Yearly	Other	Person Responsible	Completion Date
Federal/State Deadlines	~Notice of non-renewal (by May 15) ~Transfer of administrator to subordinate position (by May 15)						
District Deadlines							
<i>District</i>							
<i>Department</i>	Review impact of new state legislation.						
	Prepare a year-end HR/Personnel Department report that displays information related to the department goals and achievements, as well as data that supports the department functions (e.g. number of separation and reasons, number of job postings, sources of recruitment events, number of new hire and their status (new, transfer, rehire, etc.), numbers of leaves; number of dispatched substitutes, numbers of legal cases – complaints, investigations, grievances, etc.						
<i>Labor Relations</i>							
<i>All Staff</i>							
<i>Supervisors</i>	Transfer of administrator to subordinate position, letters out by May 15 <sup>th</sup> .						
	Keep track of new admin hires in order to provide mentorship for upcoming year.						
	Begin preparation of administrator contracts for the upcoming school year. Ensure that the Board of Directors has previously approved the related Resolution.						

	Work with Staffing Supervisor on Administrative contract finalization						
<i>Evaluation</i>							
<i>Certificated Staff</i>	Finalize non-renewal notices for employees with unsatisfactory probation status and/or provisional status that will be non-renewed – no later than May 15.						
	Deliver (and sign for) certificated contract non-renewals before May 15 (performance related or RIF).						
	Complete Summer School hiring spreadsheets						
	Organize LOA's & disclosures received back from subs, update spreadsheet, term non-returning subs, and check new disclosures						
	Pull a random set of certificated files. Review credit, degree and experience data to ensure it has been accurately calculated and reported on the 275 report.						
	Check to ensure that all required staff (certificated and classified) evaluations are complete by the applicable deadlines.						
	Follow-up to ensure that all issued contracts have been signed returned and filed.						
	Send final reminder of certificate, license or work visa expirations.						
<i>Classified Staff</i>	Check to ensure that all required staff (certificated and classified) evaluations are complete by the applicable deadlines.						
	Send final reminder of certificate, license or work visa expirations.						
<i>Substitutes</i>							
<i>Supplemental Pay</i>							

<i>Hiring</i>							
<i>PD/Training</i>	Finalize upcoming year's hiring and on-boarding materials.						
<i>Data Collection</i>	Send out Mentor Teacher Survey to admin and new teachers						
	Send out New Teacher Survey						
<i>Fiscal</i>	Change fiscal year on security forms.						
	Review K-3 actual staffing with Budget & Accounting to determine if adjustments may be needed in the current year 275 reporting.						
<i>Misc.</i>							

<b>JUNE RESPONSIBILITIES</b>							
Audience	Task	Notes	Quarterly	Yearly	Other	Person Responsible	Completed Date
Federal/State Deadlines							
District Deadlines							
<i>District</i>							
<i>Department</i>	Provide support to the Board of Directors for the review and/or issuance of the Superintendent's contract and/or other individual administrator contracts.						
	Continue negotiation as appropriate.						
<i>Labor Relations</i>							
<i>All Staff</i>							
<i>Supervisors</i>	Issue administrator contracts for the upcoming school year						
	Audit Administrative pay contracts						
<i>Evaluation</i>							
<i>Certificated Staff</i>	Ensure that all administrator and certificated evaluations are completed, submitted to HR and filed as appropriate.						
	Continue to place student teachers						
	Prepare out-of-endorsement waivers for August School Board meeting						
	Update educational records for certificated employees and change schedule placement as appropriate for the upcoming school year.						
	Letters of Assurance.						
	Input certificated evaluation data into master database						

	Work on expiring certificates						
<i>Classified Staff</i>	Ensure that all classified evaluations are completed, submitted to HR and filed as appropriate.						
	Switch all Summer School employees/STEM Empmaster after payroll deadline.						
	Before end of school term, email 10-month employees on leave regarding need for doctor's release before return and before they can attend any summer training.						
	Temporary/seasonal hires						
<i>Substitutes</i>	Term and pull all personnel files for Intern Substitutes.						
	Continue to organize LOA's & disclosures received back from subs, update spreadsheet, term non-returning subs, check new disclosures.						
	Update the substitute database system as appropriate to reflect changes in substitute and/or temporary employees and their related data.						
	Continue to send out confirmation of LOA's email with attachment to substitutes.						
	Work with Substitute Application & Selection Specialist on LT pay rates.						
<i>Supplemental Pay</i>	Creation, and payment, of stipends: Medication overload, ESP, workload, National Boards.						
	Send supplemental contracts to home addresses.						

<i>Hiring</i>	Process summer school documentation and hiring lists						
<i>PD/Training</i>	Review New Hire Orientation materials and make revisions as necessary.						
<i>Data Collection</i>							
<i>Fiscal</i>	Provide input for budget preparation.						
	Prepare spreadsheet for Payroll Department for triple deductions by the fifth of the month.						
	Make changes to pay assignments for maintenance personnel moving from PM to AM.						
	Summer School Finalization, support summer school contract build						
	Submit an update to the S-275 if needed.						
	Continue budget preparation and staffing work for the upcoming school year, making final adjustments in preparation for adoption of the budget by the Board of Directors.						
	Salary table updates as available						
	Provide input for budget preparation.						
	Update budget database records to reflect experience changes. Support RFPA entries for upcoming school year						
<i>Misc.</i>	End of year wrap up (gathering missing documents, etc.)						



<b>JULY RESPONSIBILITIES</b>							
Audience	Task	Notes	Quarterly	Yearly	Other	Person Responsible	Completed Date
Federal/State Deadlines	Budget due						
District Deadlines							
<i>District</i>							
<i>Department</i>	Update district and/or department organization chart, directories, etc. in preparation for August distribution.						
	Prepare a year-end HR/Personnel Department report that displays information related to the department goals and achievements.						
	Audit and review quarterly reports for workers' compensation and unemployment benefits. Take action as necessary to return workers to their positions and/or process claims.						
	Prepare "Welcome Back" information for all employees for August distribution. (news, updates, HR/Personnel reminders, policy reminders, training requirement notices, etc.)						
	As bargaining concludes, update all CBAs and distribute to site administrators as appropriate. Update the CBA "time schedule" document as appropriate as well. Schedule meetings as appropriate to update administrators and key department officials (payroll) as to changes in the CBAs.						

	Review open personnel and labor matters to ensure closure on those which affect the start of school.						
	Review any changes to the Washington State Records Retention Schedule.						
	Pre-set Labor Management dates for new year						
	Edit Annual Fall Reminders						
	Review actions taken to accommodate employees during the prior year. Prepare a year-end report of ADA plan progress and accommodation actions.						
	<a href="http://www.wspa.net">Check the WSPA web site for updates to legal requirements that may be new and/or changed – www.wspa.net.</a>						
	Review grievance actions to ensure that all steps have been taken appropriately to process the grievance in accordance with contract requirements.						
	Review the agreement with your Drug and Alcohol and/or Pre-Employment Physical testing providers. Determine if changes are needed and arrange for agreements for the upcoming school year.						
	Conduct negotiation sessions with union representatives. Continue to prepare materials and/or information to support negotiation activities as necessary.						
	Review HIPPA requirements and adjust materials as necessary to provide accurate information to employees, administrators and/or update the Board policies and/or procedures.						

	Update department organizational chart, directories, etc. in preparation for the new school year.						
	Update forms as appropriate to reflect changes for the new year.						
<i>Labor</i>							
<i>All Staff</i>	Check to ensure that all employee evaluations for the prior year are completed and filed. Prepare a report for the Superintendent to reflect this information.						
<i>Supervisors</i>	Final check to ensure that all certificated and administrator contracts are signed and filed.						
	Final check on administrative new fiscal year information						
<i>Evaluation</i>							
<i>Certificated Staff</i>	Update due dates on documents: Comp. Timeline, Focused Timeline, One Sheet to Bind Them, Performance Tracking template, TPEP Eval Overview, Tracking Items due						
	Review staffing for K-12.						
	Verify experience for new hires, both certificated and classified. Ensure we have documentation showing correct placement.						
	July 1 <sup>st</sup> In district and out of district sent in combined lists to schools must interview top two most senior. (Certificated)						
	Manage student teacher placement, emails and phone calls.						
	Assist employees with requests for leaves of absence for the next school year.						
	Close out one-year leave files making sure they have accurate pay assignments for coming year						

	Review expiring certification for existing employees. Communicate with employees to ensure they are processing their renewals as appropriate.						
	Follow up on letters of assurance.						
	Final check to ensure that all certificated and administrator contracts are signed and filed.						
<i>Classified Staff</i>	Verify experience for new hires, both certificated and classified. Ensure we have documentation showing correct placement.						
	July 1 <sup>st</sup> In district and out of district sent in combined lists to schools for Para educators (classified)						
	Process STEM hires. (CLASS)						
	Mail a copy of the email sent to 10-month employees still have not heard from that a release is needed before return, or new paperwork to extend leave into new school year.						
<i>Substitutes</i>	Review and update all electronic forms for new substitutes.						
	Update employee and/substitute handbooks.						
	Follow up with any subs from whom we have not received LOA's.						
	Work with Substitute Application & Selection Specialist on LT pay rates.						
	Prepare contracts for subs and any email communication that may go out.						
	Move terminated and substitute files to archived storage.						
<i>Supplemental Pay</i>	Prepare supplemental forms for elementary and secondary payment prior to the tenth of the month.						

	Mail supplementals and contracts to home addresses.						
<i>Hiring</i>							
<i>PD/Training</i>	Update the HR/Personnel section of the annual administrator training and/or orientation agenda for summer trainings. Prepare related materials for presentation(s).						
	Update orientation materials for new hires, including new substitute and/or temporary staff. Finalize orientation dates, schedule, location, presenters and materials. Prepare orientation announcement materials.						
	Finalize secretarial in service/PD for classified staff.						
<i>Data Collection</i>	Collect data that supports the department functions (e.g. number of separation and reasons, number of job postings, sources of recruitment events, number of new hire and their status (new, transfer, rehire, etc.), numbers of leaves; number of dispatched substitutes, numbers of legal cases – complaints, investigations, grievances, etc.						
<i>Fiscal</i>	Create pay assignments for all Summer School employees (CERT)						
<i>Misc.</i>	Box up oldest year leave files to ship to Warehouse and shift last year's files to make room for coming year						
	In consultation with Business Services, review staffing for the upcoming school year and estimate K-4 FTE need and planned staffing to prepare for K-4 compliance reporting. Review staffing needs with site administrators as changes occur.						
	Plan for roles						

	Review monthly edit checklist for HR Specialists. Update and/or revise as necessary.						
	Review any changes to the Washington State Records Retention Schedule.						

AUGUST RESPONSIBILITIES							
Audience	Task	Notes	Quarterly	Yearly	Other	Person Responsible	Completed Date
Federal/State Deadlines							
District Deadlines							
<i>District</i>							
<i>Department</i>	Conduct negotiation sessions with union representatives.						
	Ensure that the name, address, phone number of district Affirmative Action Officer, Title IX Officer, and Section 504 Coordinator are published. Coordinate with other mandated public disclosure notifications. This information is typically included in the District Calendar, published by the Superintendent's or Community Relations offices.						
	Identify HR Goals for upcoming year						
	Review open personnel and labor matters to ensure closure on those which affect the start of school.						
	Bring remaining salary schedules to Board for approval						
	Send out an email regarding HR staff authorized to use the WAC stamp						
	Ensure that salary schedules and calendars are posted online.						
	Attend the annual WASPA/WASBO S 275 reporting workshop and/or webinar.						

	Update the Non-Discrimination Statement for the website ensuring accuracy in the stated district compliance officers.						
	Review Drug and Alcohol testing list. Send updated roster to Drug and Alcohol testing provider.						
	Process final shared leave donations and prepare a final shared leave report for the current school year.						
	Check to make sure those returning from leave have a new year pay assignment.						
	Send certified mail to any remaining previous year employees who have not submitted a release or leave extension paperwork.						
<i>Labor Relations</i>	Participate in, and coordinate, negotiation sessions with union representatives. Continue to prepare materials and/or information to support negotiation activities as necessary.						
	Update all CBA's						
	Create a summary sheet of major changes per CBA						
	Distribute to appropriate staff: site and program administrators, HR Specialists, SLT, etc.						
	Schedule meetings as appropriate to update administrators and key department officials (payroll) as to changes in the CBAs.						



	Review grievance actions to ensure that all steps have been taken appropriately to process the grievance in accordance with contract requirements.						
<i>All Staff</i>	Recommend procedure for tracking I-9 documentation. Review expired INS/work visa permits. Ensure that all employees working with temporary authorizations are legal and/or take action to remove the employee from their work assignment and/or separate employment as necessary.						
	Coordinate sending a policy reminder information to employees subject to Drug and Alcohol testing.						
	Ensure that all employees working with temporary US Work authorizations are legal and/or work with HR Directors as needed to remove the employee from their work assignment and/or separate employment as necessary.						
<i>Supervisors</i>	Advise administrators of changes in policies, procedures, rules and regulation related to HR (Highly Qualified, Certification, ADA, FMLA, FLSA, EEO rules, etc.)						
	Update administrators on negotiation activities and changes in CBAs as a result of negotiations.						
	Update administrators on staffing, budgeting and related data.						

	Send Annual Fall Reminders document to All Administrators (or give out at All Admin meeting)						
	Inform certificated employees/principals of professional leave guidelines, including the rules for use of substitutes and the limits to the number of substitutes per day for professional leave purposes.						
	Send reports to evaluators listing the employees they will be responsible for evaluating and the evaluation cycle the employee will be on for the upcoming school year. This should include probationary evaluations and required observation dates for all new hires. Ask evaluators to review, make any corrections and return to HR for final distribution in September.						
	Review staffing for the upcoming school year with principals and department administrators to prepare for any potential changes.						
<i>Evaluation</i>	Review evaluation status for all employees for the upcoming school year. If any employees are scheduled for probation status for the following school year, schedule meetings as appropriate to review status and resources needed.						
	Set up Certificated Evaluations for next year. Roll up evaluation type and Tenure status, remove retiree's and resignations, add new hires and update Evaluation management system						
	260 day employee evaluations due						

<i>Certificated Staff</i>	Begin meetings with certificated staff around Informal Plans of Improvement						
	For all sites check teacher certification and highly qualified requirements to the assignments noted on the roster.						
	Take action as appropriate to reassign staff to appropriate assignments and/or create waivers and related documents as appropriate for reporting to the Board of Directors, parents and others. Remind principals of assignment rules and regulations, both for certification and Highly Qualified regulations.						
	Out of endorsement waivers presented to School Board by the first August School Board meeting.						
	Finalize Certificated Staffing allocation.						
	Assign new employee mentors working with site and/or department administrators.						
	Switch all Summer School/STEM employees back to their original Empmaster screens after August payroll.						
	Pull a random set of certificated files. Review credit, degree and experience data to ensure it has been accurately calculated and reported on the 275 report.						

	<p>Request schedules and staff assignment rosters from all sites. For all sites check teacher certification and highly qualified requirements to the assignments noted on the roster. Take action as appropriate to reassign staff to appropriate assignments and/or create waivers and related documents as appropriate for reporting to the Board of Directors, parents and others. Remind principals of assignment rules and regulations, both for certification and Highly Qualified regulations.</p>						
	<p>Finalize Certificated Staffing allocation.</p>						
	<p>Review expired certificates list. Communicate with employees as appropriate to determine the status of their renewal applications. Communicate with administrators as appropriate to ensure they are aware of the status of the expired certificate. BEFORE school starts, conduct a final check. If any certificated employee does not hold a valid certificate, take action to remove them from their assignment BEFORE the first day of school.</p>						
	<p><a href="#">Download the list of approved clock hour providers and approved private schools from the OSPI web site, <u>www.k12.wa.us</u>, and add to your binder of previous information. This data is needed when checking clock hours and experience from private schools for the upcoming school year.</a></p>						

	Adjust compensation for staff holding or obtaining National Board Certification.						
<i>Classified Staff</i>	Finalize Classified Staffing allocation.						
<i>Substitutes</i>	Create calendar of new substitute orientation dates for the upcoming school year.						
	Continue updates and corrections to the substitute database as appropriate.						
	Term subs who didn't return their Letter of Assurance; update info in sub database						
	Pull all subs who have not worked in the past year and make contact with them to see if why they have not worked and if coming back. Tell them to turn in LOA if coming back.						
	Get a list of subs who have returned LOA's to security no later than 2-3 days before subs are asked to come in and get badge for next year.						
	Review SPED position codes for August sub pays. Tech Services needs updated list each August.						
	Inform certificated employees/principals of professional leave guidelines, including the rules for use of substitutes and the limits to the number of substitutes per day for professional leave purposes.						

<i>Supplemental Pay</i>	Update list of employees who will be issued supplemental contracts for extra duties and/or coaching authorizations for the upcoming school year based on feedback from site administrators. Submit the list of employees who will be issued supplemental contracts for extra duties and/or pay authorizations for coaching to the Board of Directors for approval. This list should also include any volunteer coaches.						
	Process Supplemental payments and send supplemental contracts to employees.						
	Set up ROTC supplemental pay						
	Audit and build or roll one-off stipends						
	Create, test and implement any new stipends as required by bargaining including creating processes for manipulating stipends as required by employee circumstances						
<i>Hiring</i>	Continue recruiting activities to locate applicants for remaining vacancies and the substitute and temporary staff pool.						
<i>PD/Training</i>	Participate in annual administrator training workshop activities.						
	Create and share a calendar of PD opportunities						
	Conduct a "Welcome Back" meeting for all substitute staff. Distribute updated substitute handbooks to substitute staff. Review changes as appropriate.						
	Continue to define, document and monitor training program compliance for new and existing employees.						

<i>Data Collection</i>							
<i>Fiscal</i>	Update S-275 database system for final transmittal in September for the previous school year.						
	Prepare reports to compare year-end staffing budgeted staffing, working with Business Services and other staff responsible for district staffing functions.						
	Audit new fiscal year information. Work with Data Enabled Spreadsheet and Tech Services reports to identify and correct data entry errors						
	Finalize salary table changes, work with Payroll for data verification						
<i>Misc.</i>	Update emergency/disaster information and emergency telephone trees and forward to Security.						
	Prepare VOE's and transfer records						

SEPTEMBER RESPONSIBILITIES								
Audience	Task	Notes	Quarterly	Yearly	Other	Person Responsible	Completed Date	
Federal/State Deadlines	Final S275 due							
District Deadlines								
<i>District</i>	Present opening of schools report to board.							
<i>Department</i>	Begin compiling documents for annual RAS (Risk Assessment Survey) in coordination with the district Safety Specialist.							
<i>Labor Relations</i>	Conduct negotiation sessions with union representatives. Continue to prepare materials and/or information to support negotiation activities as necessary.							
	As bargaining concludes, update all CBAs and distribute to site administrators as appropriate. Update the CBA "time schedule" document as appropriate as well. Schedule meetings as appropriate to update administrators and key department officials (payroll) as to changes in the CBAs.							
	Pre-set Labor Management dates for new year							
	Update the CBA "time schedule" document as appropriate as well.							
<i>All Staff</i>	Coordinate sending a policy reminder information to employees subject to Drug and Alcohol testing.							
	Tally carryover shared leave from previous year and add it to the pool balance.							
	Work closely with timekeepers regarding whether or not to wait to do timekeeping until front loads are available for those employees who do not have enough leave balances.							



	Double check all employee pay screens for all full year leaves or employees on unpaid leave first of the year to make sure pay screens have been adjusted or deleted.						
<i>Supervisors</i>	Review the evaluation reports distributed to administrators in August. Update as necessary. Redistribute to administrators so they will have an accurate list of employees they are required to evaluate, the evaluation type or cycle, and the due date of that activity, including probationary evaluations or required observations.						
	Provide evaluation/performance appraisal information updates and/or training for administrators. Check procedures for tracking administrator training related to evaluation processes, as administrators are required to maintain teacher evaluation training on a current basis.						
	Advise supervisors to inform all employees of the evaluation process and tools that will be utilized for their evaluation for this year. Receive documentation from each site that this information has been distributed to all employees.						
	Advise administrators of changes in policies, procedures, rules and regulation related to HR (Certification, ADA, FMLA, FLSA, EEO rules, etc.)						
	Update administrators on negotiation activities and changes in CBAs as a result of negotiations.						
	Update administrators on staffing, budgeting and related data.						
	Send updated staffing reports to site and department administrators. Ask administrators to double-check data and report any discrepancies.						

<i>Evaluation</i>							
<i>Certificated Staff</i>	Send HR Confidentiality agreement to all interns and new admin staff (cc Principals)						
	Review processes for any staff scheduled to be on probation. Meet with evaluators and review specific steps; establish specific timelines, processes, resources, assistance and responsibilities.						
	Notify certificated employees of deadlines for submitting new educational records or experience verifications that would affect salary schedule placement.						
	Identify new hires eligible for the District New Hire Mentor Program. Work with others as appropriate to assign mentors and maintain appropriate documentation. Provide information and/or conduct orientation for assigned mentors.						
	Check staffing if applicable for certification and Highly Qualified requirements to the planned assignment.						
	Take action as appropriate to reassign staff to appropriate assignments and/or create waivers and related documents as appropriate for reporting to the Board of Directors, parents and others. Remind principals of assignment rules and regulations, both for certification and Highly Qualified regulations.						
	Obtain first four (4) days and every Monday report of school enrollment reports/rosters/master schedules from schools. Prepare data reflecting the impact of actual enrollment on current year staffing. Attend meetings to adjust staffing as needed.						

	Collect staff rosters and master schedules from all sites to conduct a final check of appropriate assignment as related to certification and Highly Qualified requirements as assignments often change just before and after the start of the school year. Process waivers or take other actions as necessary to ensure compliance.						
	Prepare reports of new hires and distribute to various other departments and/or administrators as appropriate, including to union representatives.						
	Complete Evaluation list and distribute to evaluators so they can communicate with employees by Sept. 30 <sup>th</sup> .						
	Issue certificated contracts for those who had FTE changes						
	Enter Credits/Clock hours and Experience for Salary placement						
<i>Classified Staff</i>	Review processes for any staff scheduled to be on probation. Meet with evaluators and review specific steps; establish specific timelines, processes, resources, assistance and responsibilities.						
	Term Summer Seasonal employees.						
	Finalize Classified Staffing allocation.						
<i>Substitutes</i>	Substitutes can accept badges for the next fiscal year mid-May and onwards. Document the substitutes who have received updated badge to turn into AESOP Specialist.						
	Manage substitute pool to ensure the right school with the right position.						
<i>Supplemental Pay</i>	Issue supplemental contracts for both current and prior year						

	Create, test and implement any new stipends as required by bargaining including creating processes for manipulating stipends as required by employee circumstances						
<i>Hiring</i>	Continue to recruit for vacancies and substitute employees as necessary.						
<i>PD/Training</i>	Participate in annual administrator training workshop activities.						
	Create and share a calendar of PD opportunities						
	Review Safe Schools modules with appropriate district directors. Update custom modules as needed. Reset training effective dates and completion dates.						
<i>Data Collection</i>	Equity report due Sept. 30.						
	Review and prepare for the BEA 1497 report in coordination with other departments. Issue directions and information to principals or department administrators as appropriate						
<i>Fiscal</i>	Prepare reports comparing actual staffing based on September data vs. budgeted staffing. Review with Business Services or others as appropriate to adjust budget as needed.						
	Finalize salary table changes, work with Payroll for data verification						
	Audit new fiscal year information. Work with Data Enabled Spreadsheet and Tech Services reports to identify and correct data entry errors						
	Fine tune any oddities that cause pay errors						
	Submit final S-275 report for the previous year. Check all data prior to submitting to ensure data is correct, including reporting of salaries and K-4 FTE.						

	Review the S-275 reporting requirements for the new year. Schedule activities, including training events offered by WSPA, WASBO or the ESD.						
<i>Misc.</i>	Prepare VOE's and transfer records						
	Complete Loan Forgiveness Applications						
	Audit and build or roll one-off stipends						

<b>OCTOBER RESPONSIBILITIES</b>							
Audience	Task	Notes	Quarterly	Yearly	Other	Person Responsible	Completed Date
Federal/State Deadlines							
District Deadlines							
<i>District</i>	Send Inclement Weather Work Expectations to District Staff						
<i>Department</i>	Determine HR's annual goal						
	Attend AASPA annual conference.						
	Attend the WSPA Fall Law Conference.						
	Attend ESD workshop on S-275 reporting.						
	Partner with Risk Management in the completion of the Risk Assessment Standards survey.						
	EEO5 report due Nov. 30						
<i>Labor Relations</i>	Gather data for bargaining						
	Check district collective bargaining agreements for mandated deadlines. Update the CBA timeline document and distribute to administrators and others as appropriate						
	Check district collective bargaining agreements for mandated deadlines.						
<i>All Staff</i>	Review actions taken to accommodate employees during the prior year. Prepare a year-end report of ADA plan progress and accommodation actions.						

	Prepare reminder notices to any staff with expiring certification, licensing, work visas and/or required training as appropriate. Update employee records with completed training data. Continue to monitor to ensure that all employee-required training is current.						
<i>Supervisors</i>	Review evaluation requirements with administrators.						
<i>Evaluation</i>							
<i>Certificated Staff</i>	October 1 is the first date for placing certificated employees on probation for the year. Ensure all procedures and notices are in place.						
	Remind evaluators or 90-day new-hire observations/evaluations and/or probationary evaluation requirements.						
	Verify experience for new hires, both certificated and classified. Ensure we have documentation showing correct placement.						
	Prepare official October enrollment/staffing reports. Check sections for elementary PE, Music, Library staff that provide release time support for teachers. Utilize this data to update P, K, E, F, M, S codes for S 275 reporting and K-4 calculations.						
	Start activities for the S-275 report for the current year.						
	Update of all credits/clock hours and experience and update salary placement						
	Update observation tool with employee selected Focused Criterion on TPEP						
	Run National Board report and update S275						

<i>Classified Staff</i>	Term October summer employees						
<i>Substitutes</i>							
<i>Supplemental Pay</i>	Check department head sections and/or other data that would alter compensation amounts for supplemental contracts.						
	Create non-essential stipends, which are paid later in the year – National Boards, Supply, etc.						
<i>Hiring</i>	Review list of job descriptions to be updated for the year. Schedule and assign activities to complete this task.						
<i>PD/Training</i>	Update orientation materials for new hires, including new substitute and/or temporary staff. Finalize orientation dates, schedule, location, presenters and materials. Prepare orientation announcement materials.						
	Finalize secretarial in service/PD for classified staff.						
<i>Data Collection</i>							
<i>Fiscal</i>	Review September and October payroll data with payroll one more time to ensure accuracy of data and changes.						
	Review September and October payroll data with payroll one more time to ensure accuracy of data and changes.						
<i>Misc.</i>	File all new contracts, supplemental contracts and pay authorizations prepared for the current year into the employees' personnel files.						



NOVEMBER RESPONSIBILITIES							
Audience	Task	Notes	Quarterly	Yearly	Other	Person Responsible	Completed Date
Federal/State Deadlines	Initial S275 due						
District Deadlines							
<i>District</i>							
<i>Department</i>	Review any changes to the Washington State Records Retention Schedule.						
	Review Affirmative Action Plan/Program for next due date.						
	Begin preparation of annual Affirmative Action Report to the Board of Directors. Prepare data from prior year activities (openings/reasons and hires/status, including gender, ethnicity, and other required reporting data).						
<i>Labor Relations</i>	Begin discussions with union representatives to determine work calendars for the upcoming school year if they are not already established by previous bargaining activities.						
	Review changes in laws to determine if new labor law posters are required at work sites. If so, obtain new posters. Confirm each work site has the labor law posters appropriately displayed.						
<i>All Staff</i>							
<i>Supervisors</i>							
<i>Evaluation</i>							

<i>Certificated Staff</i>	Check to ensure that required observations and/or probationary evaluations are completed and on file in personnel as appropriate.						
	Verify experience for new hires, both certificated and classified. Ensure we have documentation showing correct placement.						
	Complete and transmit the initial State S-275 report. Continue to make corrections as necessary in preparation for the December submission.						
	Prepare for second semester or trimester staffing. Request planned schedules to review certification, endorsements and Highly Qualified information to planned assignments.						
	Pull a random set of certificated files. Review credit, degree and experience data to ensure it has been accurately calculated and reported on the 275 report.						
	EEO5 report due Nov. 30						
	90 Observations due this month						
<i>Classified Staff</i>	Check to ensure that required observations and/or probationary evaluations are completed and on file in personnel as appropriate.						
	Verify experience for new hires, both certificated and classified. Ensure we have documentation showing correct placement.						
	Insert salary adjustments for minimum wage, stop/start affected employees, recalculate employees and audit						

	Term November summer employees						
	Set up Classified Evaluations and distribute						
<i>Substitutes</i>							
<i>Supplemental Pay</i>	Issue a report displaying all supplemental contracts and pay authorizations for extra duties and/or coaching assignments to site administrators. Ask the administrators to double check and verify the assignments. Adjust pay authorizations accordingly.						
	Create non-essential stipends, which are paid later in the year – National Boards, Supply, etc.						
<i>Hiring</i>	Begin preparations for next year recruitment functions. Schedule dates on calendars. Review recruitment materials in preparation for changes as necessary.						
	If applicable, review online application information and instructions for applicants. Update as necessary.						
	Work on updates to job descriptions.						
	Review staffing for the current year. Attend meetings as appropriate to make final adjustments for the current year and prepare reports comparing current year staffing to budget planned staffing.						
	Schedule location for District Career Fair						
	Review online application information and instructions for applicants. Update as necessary.						
	Verify registration for Career Fair participation.						

<i>PD/Training</i>	Conduct HR related training for administrators to continue updating administrators in key HR areas on a regular basis.						
<i>Data Collection</i>							
<i>Fiscal</i>							

DECEMBER RESPONSIBILITIES							
Audience	Task	Notes	Quarterly	Yearly	Other	Person Responsible	Completed Date
Federal/State Deadlines							
District Deadlines							
<i>District</i>	Confirm the EMPPAYS for any outgoing School Board members have been ended and remaining stipends paid.						
	Confirm EMPPAYS have been built for incoming School Board members.						
<i>Department</i>	Prepare historical data from prior year for storage (calendars, salary schedules, S275 summary reports, substitute usage, leave usage, other data reports, etc.).						
	Review minimum wage potential changes for the upcoming calendar year. If changes are required, submit changes to the Board of Directors and/or work with unions to ensure that all positions meet the new minimum wage requirements. Adjust pay as appropriate. Be sure to review hourly wage determination for coaching positions as part of this process.						
	Take time to review the CBAs with administrators to determine if any changes may be necessary or are desired for upcoming negotiations.						
	Review changes in laws to determine if new labor law posters are required at work sites. If so, obtain new posters. Check each work site to ensure that all labor law posters are appropriately displayed.						

	Post annual workers compensation and unemployment reports as required.						
	Review district policies for additional updates as necessary.						
<i>Labor Relations</i>							
<i>All Staff</i>	Review actions taken to accommodate employees during the prior year. Prepare a year-end report of ADA plan progress and accommodation actions.						
	Prepare and/or review unemployment reports.						
<i>Supervisors</i>							
<i>Evaluation</i>							
<i>Certificated Staff</i>	Finalize revised application for admin internship in December.						
	Continue data updates to the S-275 report.						
	Submit the December 275 report. This report is utilized by SPI and legislators for this year's legislative session activities. Be as careful as possible to ensure that this report is accurate – for salaries, benefits and assignment reporting. Double check the K-4 FTE reported and K-4 FTE requirements.						
	Check the master schedules from the high schools and the middle/junior high schools for correct teaching assignments with teaching certificates/endorsements and highly qualified requirements.						
	Prepare a list of expiring teaching certificates, licenses, work visas and/or permits. Ensure that all staff are working with valid certification and/or licensing as required.						

	Prepare certificated contracts and submit						
	90 day observations for later hires due						
<i>Classified Staff</i>							
<i>Substitutes</i>							
<i>Supplemental Pay</i>	Process non-12 month stipends						
<i>Hiring</i>	Continue to review recruitment plans and prepare recruitment materials and events for the upcoming recruitment season.						
	Archive inactive applicants. Store archived applicant data as appropriate.						
<i>PD/Training</i>	Update orientation materials for new hires, including new substitute and/or temporary staff. Finalize orientation dates, schedule, location, presenters and materials. Prepare orientation announcement materials.						
	Finalize secretarial in service/PD for classified staff.						
<i>Data Collection</i>	Prepare a report of the prior year applicant data and activities.						
<i>Fiscal</i>	Prepare HR department budget and expenditures.						
<i>Misc.</i>							