

HUMAN RESOURCES ANNUAL PLANNING CALENDAR

July	August	September	October
<ul style="list-style-type: none"> • Update to new salary schedules; develop local schedules for employee groups as needed • Continue hiring new employees • Continue planning for Fall Induction Week and Orientation of New employees • New licenses go into effect; organize and recode paper files • Close monitoring with principals of enrollment, watching for unanticipated growth or decline with respect to teacher allotments. Alert maintenance of potential needs for additional classrooms • FBS Summer Conference • Webpage updates (duties, personnel, salary, hiring incentives, etc) • HQ Reports due (HQ Teachers, Paraprofessional, and Professional Development); data reports in HRMS; input data through LicSal website • Begin POY process; State portfolio due end of November 	<ul style="list-style-type: none"> • Bill agencies that sponsor teaching positions • Purge & update substitute teacher list; share with schools • Continue conducting orientation sessions for new employees • Obtain from, and follow up with, new employees for benefits information • Provide lists of all employees and new employees for groups and newspapers • Set up computer records and payroll for new school year-final step of balancing employees hired against 40 or more allotment categories • Conduct annual training and open enrollment programs such as Drug Free Workplace, Blood Borne Pathogens, flexible benefits, health insurance, etc. • Obtain opening days' enrollment and class size information during first 10 days of school; monitor for Issues and make adjustments as necessary (carry over to September) • Update Personnel Directory • Update random drug testing list • Update training for HRMS 	<ul style="list-style-type: none"> • Work with DPI Licensure to get remaining licenses in process • Continue to hire and process new employees • Continue to follow-up with new employees to get correct paperwork for the benefits they have • After Board approval, ask Superintendent to sign new contracts; Return a signed copy to employee • Update DFWP Random Screening List with vendors • Begin Teacher Advisory Committee meetings • Key information about New Hires into HRMS or other system if not completed as they were hired • Tuition Reimbursement • Praxis payment or reimbursement • TOY Portfolio due to State • Determine payroll information for Induction pay for new teachers and mentors and Monthly pay mentors • September 30 SBE deadline for LEA Board decision re: Low Performing Schools 	<ul style="list-style-type: none"> • Begin work on next year's school calendar • Schedule formal sessions with principals regarding employees who may be in trouble • Prepare Fall Athletic Supplement list for payroll • Attend Fall PANC meeting • Work with new teachers to obtain any documents still needed to apply for NC licensure; adjust to substitute pay as necessary if process not completed at this time • Prepare several annual reports: full-time staff (SS200 - gender, race, funding resource, and position); local supplement (SS300 - funding source and amounts or average); EEO5 report (federal equal employment opportunity) • Complete for compliance with NCEES timelines, completeness of forms, etc; communicate findings • Designated Low Performing Schools' information • Share Turnover Report Information with Principals • VIF FICA notifications & Tax Treaty Info • Allotment Adjustments (10 day/ 2nd month) • Begin recruitment planning • ACA Lookback period review • Review TWC data (every 2 years) • Prepare for release of school report cards
<p style="text-align: center;">November</p> <ul style="list-style-type: none"> • Correspondence to teachers who hold provisional licenses or who lack renewal units; send all teachers an update on status of renewal credits • Assist payroll with annual supplement list • Distribute Personnel Directories, ASAP after completing • Plan to spend time recruiting teachers for January vacancies • POY portfolio due to State • NBPTS results provided; salary changes retroactive to July 1; renewal credits to be applied • Prepare Budget Request for HR Office and for Systemwide Personnel Needs 	<p style="text-align: center;">December</p> <ul style="list-style-type: none"> • Finalize next year's school calendar, obtain Board approval and distribute copies as appropriate • Clean up offices and reorganize files • Review applicant interest for anticipated second semester vacancies • Schedule induction activities for January New Hires 	<p style="text-align: center;">January</p> <ul style="list-style-type: none"> • Finalize Recruitment Calendar; Make Reservations • Prepare Recruitment materials • Contact Applicants re: continuing interest • Update Substitute Teacher List; share with Schools • Complete any salary studies so that figures will be available for budget • Distribute proposed contract lists and contract conditions for principals' confirmation • NCEES Monitor/Turn-in • Begin updating Employee Handbook • 1042S for VIF or other international teachers 	<p style="text-align: center;">February</p> <ul style="list-style-type: none"> • Schedule a formal session with principals regarding teachers who may be in trouble • Purge certified applicant files and inactivate computer files • Shred old applicant files • Attend Job Fairs and follow-up appropriately • Prepare Winter Athletic Supplement list for Payroll • Board Retreat-Prepare for and attend • Begin TOY process; name TOY by end of May; TOY portfolio due to State by end of September each year • Ensure that all recruitment trips are scheduled; have airline tickets, hotel rooms, cars, etc.

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March	April	May	June
<ul style="list-style-type: none"> • Redistribute proposed contract lists and contract conditions for principals' confirmation • Receive & verify evaluation information for non-tenured teachers • Develop enrollment projection for next year & develop plan for teacher allotments after receiving State Planning Allotments • Begin processing June 1 Retirement applications • Begin license renewal activities (internal) • Be sure employment process is in place for the next school year (adequate forms, hiring checklists issued, contract offer format & procedures) • Meet with Flexible Benefits agents • Annual Teacher Turnover Report • Begin internal transfer process 	<ul style="list-style-type: none"> • Distribute teacher allotments and other allotments to schools (if not done in March) • Finalize contract list; publicize it as required by law (Beginning in 2018; 1-, 2-, or 4-year contracts) • Finalize nonrenewal list • Attend Spring PANC Meeting • Heavy Out-of-State Recruiting • Begin Staffing for Next Year's Vacancies • Continue processing retirement applications • Begin updating license information to authorize license extensions, clear provisions, and send a final alert to employees that employment will be terminated if conditions are not met • Continue license renewal processes (online system) 	<ul style="list-style-type: none"> • Assist Payroll with Annual Supplement List • Begin receiving and processing terminations to occur at the end of the school year • Conduct a final check of license renewal activities, especially in regard to renewal of contracts • Finalize contract list, nonrenewal list, and administrative contracts list for Board of Education (May 1 Admin Nonrenewal notification; May 15 teacher nonrenewal notification) • Get out renewal letters, teacher contracts, and administrative contracts • Process new hires for next year • Follow up with recruits from job fairs • Summer School Staffing and Payroll Information • TOY named; recognition/celebration • Plan Mentor and New Teacher Calendar for entire upcoming school year • Update BTSP Plan • Review Exit Survey data 	<ul style="list-style-type: none"> • Work up information for Board of Education to recognize retirees since last year • Continue processing retirements and terminations of employees • Continue hiring and inducting for next school year • Work up summer payroll information • Prepare for fall induction week for new employees • District Leadership Team Retreat • Final planning for Induction Days • Complete checking & updates for Employee Handbook • June 1: Board Notification to Administrator(s) of non-renewal • June 15: Deadline to notify teachers of employment status for next school year • Update and Print "Employee Handbook" for Induction Days' prepare other induction materials

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Websites:

LicSal: <http://licsalweb.dpi.state.nc.us>

Online Licensure System: <https://vo.licensure.ncpublicschools.gov/datamart/loginNCDPI.do>

PANC: www.pancweb.net

Financial & Business Services (NC DPI): ncpublicschools.org/fbs (salary schedules, chart of accounts, etc)

NW RESA online substitute teacher training - <http://www.nwresa.org/>

Other Support Information

NC School Boards' Association (for law and policy clarification) – another resource other than your district/Board attorney – www.ncsba.org

NC Dept of Public Instruction Contacts:

Dr. Thomas (Tom) Tomberlin, Director, Educator Human Capital and Policy Research; thomas.tomberlin@dpi.gov.nc; 919.807.3440

Alexis Schauss, Director of School Business; alexis.schauss@dpi.gov.nc; 919.807.3701

Susan Ruiz, Section Chief of Licensure; susan.ruiz@dpi.gov.nc

Rachel Beaulieu, Legislative & Community Affairs Director; Rachel.beaulieu@dpi.gov.nc; 919.807.4035

Lydia Prude, Section Chief of School Allotments; Lydia.prude@dpi.gov.nc; 919.807.3718

Gwendolyn Tucker, Section Chief of Reporting; Gwendolyn.tucker@dpi.gov.nc; 919.807.3708

Eileen Townsend, Section Chief of Insurance; Eileen.townsend@dpi.gov.nc; 919.807.3522

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Daily and/or Monthly Duties of HR Support Team Members

- Compute, complete paperwork, and send to Payroll information for Disability income and Workers' Compensation Payrolls
- Work up requests for leaves of absence and communicate with HR Administrator, Principal, and Payroll
- Verify, compute, record and send to Finance, information for Tuition Reimbursement Program and testing reimbursements
- Order and stock supplies needed for Department
- Verify budgets against Finance records monthly
- Prepare and distribute Vacancy Announcements; prepare lists of applicants for each vacancy
- Update vacancy information for Internet sites, local media, and departmental use
- Open, sort, respond to daily mail, including e-mail and voice mail
- Transfer information about employees to their new school system
- Maintain personnel management system
- Monitor HRMS for licensure changes daily
- Prepare personnel list and attachments for Board meetings Correspondence
- Filing
- Customer Service: Walk-ins and Telephone
- Receive application and file lots of applicant documents; key data into computer
- Generally correct lists for drug testing vendors to use for random drug testing
- Update database, benefits and payroll as Bus Drivers' employment (route fluctuation) changes and as Child Nutrition Operator's training changes
- Communicate as needed to arrange for, and follow up on, random drug tests
- Balance Insurance Bills Monthly (Health Insurance, Flexible Benefits', etc)
- Keep a check on audit exceptions and resolve them as they occur
- Check newly issued license for correctness; update files, BT information, and payroll as appropriate
- Verify correctness of renewal units, post them and distribute to licensed employees
- Acknowledge letters of resignation
- Acknowledge and process requests for transfer
- Acknowledge and process requests for leave
- Follow-up on information needed for new hires
- In-process and complete the I-9 E-Verify process within 3 days of an employee's first work day
- Complete Monthly New Hire Report for Dept of Health and Human Services, Division of Social Services Child Support Enforcement (Some Finance departments may do this)

Daily and/or Monthly Duties of HR Leadership Team Members

- Plan and ensure Implementation of monthly activities for new teachers and mentors
- As monthly changes in new teachers and /or mentors occur, notify Payroll as needed to ensure people paid correctly
- Review and approve all "Hire Checklists"
- Review, direct, approve, and support work of Personnel Assistants
- Salary Studies
- Ad-Hoc Reports
- Policy Review
- Attend and prepare materials for Staff Meetings (monthly)
- Attend Executive Staff Meetings (weekly)
- Attend Regional School Personnel Administrators Meetings (Bi-Monthly)
- Attend and prepare materials for Board of Education meetings (monthly)
- Constantly update HR information on web site
- Review system's and HR objectives monthly to check progress and implement new strategies
- Monitor NCEES, Licensure, Recruiting activities
- Monitor LicSal for Form G approvals/updates
- Monitor and respond to Unemployment Claims online