



STATE OF HAWAII
DEPARTMENT OF EDUCATION
P.O. BOX 2360
HONOLULU, HAWAII 96804

OFFICE OF THE DEPUTY SUPERINTENDENT

September 18, 2020

Action Required
Annual Memo

TO: Complex Area Superintendents
Principals (All)

FROM: Phyllis Unebasami
Deputy Superintendent

SUBJECT: **Academic Plan Information and Financial Plan Template Timeline for School Year 2021-2022 – TENTATIVE**

The purpose of this memo is to notify you of the anticipated release dates for the Financial Plan templates for School Year (SY) 2021-2022 and to provide additional information related to the Academic Plan. There is a requirement to share the budgeting process timeline no later than September 15 of each school year per Article XIX of the HSTA contract. However, due to the current COVID-19 situation, this memo is being issued later than normal. Please be sure to share the information contained below with your faculty **as soon as possible**.

As a reminder, all schools will be completing the following:

Plan Title	Complex Area Superintendent (CAS) Approve by
Salaried Financial Plan	December 31, 2020
Comprehensive Financial Plan	April 15, 2021
Academic Plan	May 7, 2021 and with each revision

Please refer to Attachment A for more information and due dates.

Academic Plan

Schools are asked to complete a Comprehensive Needs Assessment by November 25, 2020 to support planning efforts tied to development of the Financial Plan and the Academic Plan.

For SY 2021-2022, we will continue with the Academic Plan templates utilized for the current school year. Academic Plans are to be submitted to the Policy, Innovation, Planning and Evaluation (PIPE) Branch by May 7, 2021 via email – pipe@k12.hi.us. CASs must approve

school Academic Plans prior to submission. Please refer to the November 21, 2019 memo (Attachment B) titled "2020 Academic Plan – REVISED" for links to the template and resources.

If you have any questions regarding the Academic Plan, please contact Wanelle Kaneshiro, PIPE Director, at (808) 586-3800 or via email at wanelle.kaneshiro@k12.hi.us.

Financial Plan Templates

The school Financial Plans for Fiscal Year 2021-22 will be available in eHR in November 2020. Please note the following:

- The Weighted Student Formula (WSF) Reference database in Lotus Notes contains information related to WSF and the Financial Plan, including the Implementation Manual, the WSF Calculations, and any changes to WSF or the Financial Plan process. Please refer to the June 26, 2020 memo (Attachment C) titled "Budget Execution Procedures for Fiscal Year 2020-2021," for a link to add the database to your Lotus Notes workspace. References will be migrated to a google drive folder during the upcoming year, but will still be available in Lotus Notes for the time being.
- Complex Area Superintendents:
 - Please inform the Budget Execution Section of the deadlines you set for your complex area principals to submit both steps of the Financial Plan as soon as they are determined.
 - If you are planning to hold training sessions for the Financial Plans, please inform the Budget Execution as soon as possible with the date, time, and number of participants. Training sessions need to be scheduled in advance to ensure the system is available and there are enough resources to support the users.

If there are any questions regarding the Financial Plan templates, please contact Kimberly Chee, Budget Specialist, via email at kimberly.chee@k12.hi.us.

PU:kc

Attachments: Attachment A: School Year 2021-2022 Academic Plan and Financial Plan Process Timeline
Attachment B: 2020 Academic Plan – REVISED memo
Attachment C: Budget Execution Procedures for Fiscal Year 2020-2021

c: Assistant Superintendents
Internal Audit Office
Complex Area Business Managers
School Transformation Branch
Policy, Innovation, Planning, and Evaluation Branch
Budget Branch