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Board Report | June 12, 2018

2017-18 Business Office Department Goals

1. Provide clear, thoughtfully defined, and updated procedures and departmental policies.
2. Lead Health Insurance Committee towards a recommendation to the Board regarding FY19 Health Insurance offerings and shared premium costs.
3. Develop regular reports (report access) for administrators, coordinators, and coaches.
4. Cross-train staff on a variety of business functions, including finance-related processes.

Current Projects/Considerations

- Financial Report Development and User Access Updates (*Goal 3*)
 - Year-End Summary: Several management-relevant reports have been created in Alio Intelligence, although I am still working on making them more readily available to management staff. Several updates have been made throughout FY18 on Board Reports including formats as well as the amount of data presented.
- Clarifying human resource and payroll procedures. (*Goal 1*)
 - Year-End Summary: We are close to having a completed Employee Handbook which will include information regarding operational procedures, benefits, leaves of absence, and standards of conduct for all personnel. Board Policies and other legal resources are referenced where applicable. My goal is to have this available electronically to staff by the beginning of the FY19 School Year. Additionally, we now have a good process in place for employees to request FMLA/AFLA and the subsequent communications necessary for compliance with both Federal and State Law (also included in the handbook).
- Health Insurance. (*Goal 2*)
 - Year-End Summary: We gained two new partners this year, Paula Scott (USI) is our new Insurance Broker, and American Fidelity is our new Section 125 Compliance Manager. Both partnerships have been positive. American Fidelity has assisted us with our FY19 Open Enrollment for health insurance as well as other supplemental/voluntary Section 125 (pre-tax) options. Paula Scott has been an incredible resource for my office as well as staff members with insurance-related questions. They will both be instrumental in any upcoming health insurance plan conversations.
- Alio Reporting Updates (*Goal 3*)
 - Year-End Summary: EMA (our Alio support) is very close to getting an Alaska UserGroup up and running. As mentioned before, this will be incredibly useful as we will be able to develop our systems and reports as a group instead of in a siloed environment. This will allow us to share resources much more easily across Alaska district. One big “win” for me this year was to have them make some minor upgrades to our report screen to make it easier to re-run the same report, saving a lot of time!

Upcoming Projects/Considerations

- Develop Cross-Training objectives and timeline. (*Goal 4*)
 - Year-End Summary: while we made minor progress on this during the current year, cross-training will continue to be a goal in the upcoming fiscal year.

Staff Professional Development Opportunities

- COMPLETE: FY18 ALASBO Leadership Conference. July 21-23, 2017.
- COMPLETE: FY18 ALASBO Annual Winter Conference. December 3-6, 2017.
- ONGOING: SHRM (Society for Human Resource Management) Essentials of Human Resources, Self-Study Training Program.

Other

- Although I have tried to include all budget revisions in this board packet, please don't be surprised to see some final, minor budget revisions for FY18 in August 2018, as we prepare for the audit.

Current Contract Service Agreements (CSAs)

CONTRACT SERVICE PROVIDER	Type of Services Provided	District CSA #	Maximum Amount Authorized Under Agreement	Amount Invoiced To-Date
Vidya Oftedal (ACS)	Speech and Language Pathology	FY18-001	35,000	37,509
Kidability Physical Therapy, LLC (Kristin Bacon)	Physical Therapy	FY18-002	16,800+	20,421
Southeast Regional Resource Center (SERRC)	Psychology	DCRS 18-11-001	12,197	12,197
Kaye Lawson, OTR, MEd	Occupational Therapy	FY18-003	30,000	30,080