

## Sample Annual Calendar of Essential HR Functions

Month	Governance	CBA Tasks and Timelines	HR Leadership	HR Operations
Jul	<ul style="list-style-type: none"> <li><input type="checkbox"/> Personnel Recommendations (accept resignations, retirements, new hires)</li> </ul>		<ul style="list-style-type: none"> <li><input type="checkbox"/> Distribute administrative work year calendar for the coming year</li> <li><input type="checkbox"/> Records Management – identification of Class 1 – Permanent records to be archived/stored; identification and disposal of Class 3 records</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Prepare for fiscal year roll</li> <li><input type="checkbox"/> Send intent to return notices to substitutes</li> <li><input type="checkbox"/> Memo to Principals re: Certificated Stipends</li> <li><input type="checkbox"/> Monitor staff and substitute hours for ACA and Sick Leave Law</li> </ul>
Aug	<ul style="list-style-type: none"> <li><input type="checkbox"/> Personnel Recommendations (new hires and substitutes)</li> </ul>		<ul style="list-style-type: none"> <li><input type="checkbox"/> Review new employee handbooks (certificated, classified, and substitute teachers) and make necessary revisions</li> <li><input type="checkbox"/> Review, revise, new employee orientation presentation</li> <li><input type="checkbox"/> Schedule new employee orientations (certificated, classified, management and non-management)</li> <li><input type="checkbox"/> Certificated and classified recruitment and hiring</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Personnel requisitions for new hires, voluntary and involuntary transfers</li> <li><input type="checkbox"/> Prepare Annual Legal Notices Packet</li> <li><input type="checkbox"/> Provide Contract Management Training to Management Staff and Administrators</li> <li><input type="checkbox"/> Monitor staff and substitute hours for ACA and Sick Leave Law</li> </ul>
Sep	<ul style="list-style-type: none"> <li><input type="checkbox"/> Provide governing board with staffing update</li> <li><input type="checkbox"/> Personnel Recommendations (new hires, subs)</li> <li><input type="checkbox"/> Report announcing the granting of permanency status to certificated employees</li> <li><input type="checkbox"/> Annual report to Board regarding the disposal of personnel records classified as Class 3 – disposable (California Code of Regulations - Title 5, Section 16025)</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Generate evaluation lists and timeline for certificated and classified staff and send to supervisors with all templates/ forms</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Monitor enrollment and finalize staffing by school site</li> <li><input type="checkbox"/> Schedule and/or conduct annual contract management, grievance processing, investigation, evaluation, and FRISK training</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Prepare and distribute Annual Notices to Employees</li> <li><input type="checkbox"/> Provide Mandated Reporter Training by 6<sup>th</sup> Week of School</li> <li><input type="checkbox"/> CBEDS preparation and planning</li> <li><input type="checkbox"/> Prepare and distribute NOE/Pay Notices</li> <li><input type="checkbox"/> Review and revise List of Employees on Leave and List of Temp Assignments</li> <li><input type="checkbox"/> New hire contracts</li> <li><input type="checkbox"/> New hire orientations</li> <li><input type="checkbox"/> Credentials Audit</li> <li><input type="checkbox"/> Monitor staff and substitute hours for ACA and Sick Leave Law</li> </ul>

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Oct	<ul style="list-style-type: none"> <li><input type="checkbox"/> Prior year Student and Staff Attendance and Absence Trends report</li> <li><input type="checkbox"/> Personnel Recommendations</li> </ul>			<ul style="list-style-type: none"> <li><input type="checkbox"/> CBEDS Reporting</li> <li><input type="checkbox"/> Submit mandated cost claims for prior year for reimbursement</li> <li><input type="checkbox"/> Update department operations and procedures manuals</li> <li><input type="checkbox"/> Assignment audit</li> <li><input type="checkbox"/> Send CBEST reminders to subs</li> <li><input type="checkbox"/> Annual Notices reviewed and addresses updated</li> <li><input type="checkbox"/> Monitor staff and substitute hours for ACA and Sick Leave Law</li> </ul>
Nov	<ul style="list-style-type: none"> <li><input type="checkbox"/> CSBA Policy Maintenance Updates</li> <li><input type="checkbox"/> Personnel Recommendations</li> </ul>		<ul style="list-style-type: none"> <li><input type="checkbox"/> Counsel with principals regarding probationary certificated employee evaluations and observations</li> <li><input type="checkbox"/> Identify comparable districts, obtain copies of certificated and classified contracts, and conduct analysis</li> <li><input type="checkbox"/> Involve administrators in identifying priorities for certificated and classified contracts negotiations</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Assess utilization of technology and equipment and replace/upgrade as needed</li> <li><input type="checkbox"/> Assess efficiency of EdJoin and the paperless application process</li> <li><input type="checkbox"/> Collect applicant tracking data for the prior year</li> <li><input type="checkbox"/> Monitor staff and substitute hours for ACA and Sick Leave Law</li> </ul>
Dec	<ul style="list-style-type: none"> <li><input type="checkbox"/> Prepare and present annual teacher assignments audit</li> <li><input type="checkbox"/> Personnel Recommendations</li> </ul>		<ul style="list-style-type: none"> <li><input type="checkbox"/> Consult with principals regarding remediation plans for teachers needing improvement</li> <li><input type="checkbox"/> Begin work on enrollment and staffing projections and anticipated changes to the instructional program that could impact staffing</li> <li><input type="checkbox"/> Review and revise staffing formulas</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Update Desk Manuals</li> <li><input type="checkbox"/> Monitor staff and substitute hours for ACA and Sick Leave Law</li> </ul>

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Jan	<ul style="list-style-type: none"> <li><input type="checkbox"/> Personnel Recommendations</li> </ul>		<ul style="list-style-type: none"> <li><input type="checkbox"/> Identify certificated management and non-management staff to serve on the Recruitment Team</li> <li><input type="checkbox"/> Review/revise Teacher Recruitment Plan, Marketing Plan, and Budget</li> <li><input type="checkbox"/> Create and verify seniority list for certificated and classified personnel</li> <li><input type="checkbox"/> Identify hiring/layoff needs based on staffing formulas, enrollment projections, changes to the instructional program and budgetary constraints</li> <li><input type="checkbox"/> Work with principals to identify potential certificated non-relections</li> <li><input type="checkbox"/> Use comparability data, input from administrators to draft classified and certificated contract reopeners</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Prepare certificated and classified seniority lists as needed (guidelines determined for "Same Date of Hire" criteria)</li> <li><input type="checkbox"/> Monitor staff and substitute hours for ACA and Sick Leave Law</li> <li><input type="checkbox"/> Provide Employees with Form 1095 for prior calendar year by February 1 (ACA)</li> </ul>
Feb	<ul style="list-style-type: none"> <li><input type="checkbox"/> Prepare board resolution/action item for March 15 reassignment, transfer, release of principals/administrators</li> <li><input type="checkbox"/> Prepare board resolution/action item for March 15 service of letters of possible layoff/reassignment of certificated employees</li> <li><input type="checkbox"/> Prepare board resolution/action item for certificated employees recommended for non-relection</li> <li><input type="checkbox"/> Personnel Recommendations</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Sunshine Contract Reopeners</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Train members of the District's Teacher Recruitment Team</li> <li><input type="checkbox"/> Solicit feedback from administrators regarding proposed draft contract reopeners</li> <li><input type="checkbox"/> BY FEBRUARY 14 - decisions re: certificated non-relection sent to HR from sites</li> <li><input type="checkbox"/> Create PKS list and begin work on layoff resolution</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Finalize and post seniority list for certificated and classified personnel</li> <li><input type="checkbox"/> Prepare layoff/reassignment letters</li> <li><input type="checkbox"/> Summer School Advertising</li> <li><input type="checkbox"/> Schedule/register for Recruitment Fairs and Events</li> <li><input type="checkbox"/> Monitor staff and substitute hours for ACA and Sick Leave Law</li> <li><input type="checkbox"/> If filing paper copies of Form 1095 for prior calendar year to IRS they must be received by February 28/29</li> </ul>

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Mar	<ul style="list-style-type: none"> <li><input type="checkbox"/> Prepare classified layoff Board resolutions (Elimination of categorical programs and for lack of work, lack of funds)</li> <li><input type="checkbox"/> CSBA Policy Maintenance Updates</li> <li><input type="checkbox"/> Personnel Recommendations</li> </ul>	<p><b><u>Certificated</u></b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> BY MARCH 1 – Leave requests, intent to return from leave or continue leave due for subsequent school year</li> <li><input type="checkbox"/> BY MARCH 15 – Probationary teacher evaluations due</li> </ul> <p><b><u>Classified</u></b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Sunshine Contract Reopeners</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> BY MARCH 15 - issue layoff/reassignment notices to principals/administrators</li> <li><input type="checkbox"/> BY MARCH 15 - issue certificated non-management layoff/reassignment notices</li> <li><input type="checkbox"/> BY MARCH 15 - issue classified layoff notices</li> <li><input type="checkbox"/> Review and revise selection and hiring protocols</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Summer School Hiring</li> <li><input type="checkbox"/> Prepare annual spreadsheet for resignations, retirements, employees returning from LOA, job shares, intent to return</li> <li><input type="checkbox"/> Prepare priority hiring pool spreadsheet</li> <li><input type="checkbox"/> Prepare spreadsheet for contingent offers of employment and new hire data</li> <li><input type="checkbox"/> Conduct TB Test Audit</li> <li><input type="checkbox"/> Monitor staff and substitute hours for ACA and Sick Leave Law</li> <li><input type="checkbox"/> E-file Form 1095 to IRS for prior calendar year (if not filing via paper)</li> </ul>
Apr	<ul style="list-style-type: none"> <li><input type="checkbox"/> Personnel Recommendations</li> </ul>	<p><b><u>Classified</u></b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> BY APRIL 1 – Complete all classified evaluations due in the current year</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Begin advertising certificated vacancies and managing reassignments and voluntary transfers</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Prepare for fiscal year roll</li> <li><input type="checkbox"/> Send intent to return notices to substitutes</li> <li><input type="checkbox"/> Monitor staff and substitute hours for ACA and Sick Leave Law</li> </ul>
May	<ul style="list-style-type: none"> <li><input type="checkbox"/> Day of the Teacher and Classified School Employees Week Resolutions Recommended</li> <li><input type="checkbox"/> Declaration of Need for Highly Qualified Educators</li> <li><input type="checkbox"/> Committee on Assignments (EC §44258.3)</li> <li><input type="checkbox"/> Teacher Consents (EC §44258.7)</li> <li><input type="checkbox"/> Resolution to affirm certificated layoffs</li> </ul>	<p><b><u>Certificated</u></b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> BY MAY 1 – Temporary and Permanent teacher evaluations due</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> BY MAY 15 - Issue final certificated and classified layoff notices</li> <li><input type="checkbox"/> Staff Appreciation - Day of the Teacher and Classified School Employees Week</li> <li><input type="checkbox"/> Memo to Administrators re: calendars for next school year</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Reasonable assurance letters sent to substitute teachers</li> <li><input type="checkbox"/> Monitor staff and substitute hours for ACA and Sick Leave Law</li> </ul>

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Jun	<ul style="list-style-type: none"> <li><input type="checkbox"/> Annual Statement of Need for 30-day Substitute Teaching Permits</li> <li><input type="checkbox"/> Board Resolution to approve Waivers for CBEST</li> <li><input type="checkbox"/> Student Teaching Agreements Approved</li> </ul>		<ul style="list-style-type: none"> <li><input type="checkbox"/> Collect data on completed certificated and classified evaluations - provide to Superintendent</li> <li><input type="checkbox"/> JUNE 30 - Final written notice given to managers who will be reassigned</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Prepare personnel requisitions for certificated and classified positions with 6/30 end dates identified in January as continuing positions</li> <li><input type="checkbox"/> Identify subs who haven't worked in more than 6 mos., notice, end employment</li> <li><input type="checkbox"/> Generate personnel requisitions for new hires</li> <li><input type="checkbox"/> Generate personnel requisitions for voluntary and involuntary transfers</li> <li><input type="checkbox"/> Generate personnel requisitions for Certificated Job Share Agreements</li> <li><input type="checkbox"/> Monitor staff and substitute hours for ACA and Sick Leave Law</li> </ul>