

# Fall at a Glance

## WASBO New Admin/Support Staff

**Mark Elworthy, Director  
School Financial Services Team**

**September 7, 2022**



WISCONSIN DEPARTMENT OF  
**Public Instruction**  
Jill K. Underly, PhD, State Superintendent

12



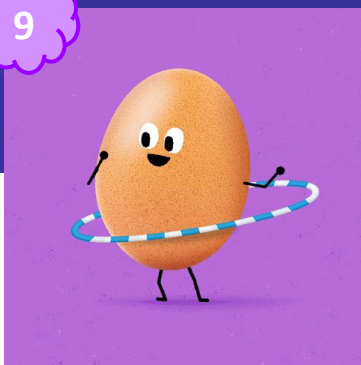
11



10



9



5



6



7



8



4



3



2



1



# Reasons for Fall at a Glance

- **Connections**
- **Resources**
- **Priorities**
- **Developing your plan**



# Connections

- Introduction SFS Team members
- Relationships matter



# RESOURCES



- Get to know your team
- Review prior budgets, audits and school board meetings
- Learn how is the board updated monthly on the budget



# Table Exercise



- **First three community members you met**
- **First projects completed**
- **Next three projects**

# Priorities



- Know what is expected of you in the first 100 days
- Complete budget reports so October 15  
General Aid can be calculated
- Develop/finalize budget for the current year

# Developing your plan

- Elevator speech about the district and budget
- Quick wins
- Long-term goals and developing a plan to support the educational goals
- Challenge – Using someone's budget format





# Juggling Three Years

<b>Prior Year 2021-22</b>	<p>Most of your DPI reporting involves submitting prior year data in the fall</p> <p>Affects most current year state aids</p>
<b>Current Year 2022-23</b>	<p>Active budget you are working under</p> <p>Pupil counts are <u>very</u> important!</p> <p>October is about Revenue Limit and Tax Levy</p>
<b>Next Year 2023-24</b>	<p>Budget-building process starts over the winter and goes into the spring and summer</p>

# How will I keep track of all this?

- **Fiscal Year at a Glance – Due dates for reports by name & purpose**
- **Fiscal Year "Multi-tasker" Planning Calendar**  
- **What to do related to prior year, current year and next year**

[dpi.wi.gov/sfs/communications/calendars/overview](https://dpi.wi.gov/sfs/communications/calendars/overview)

# Fiscal Year at a Glance

YEAR AT A GLANCE: District Financial Reports Due to the DPI SFS Team 7/1/2021 to 6/30/2022 (select non-SFS reports shown in orange, other program-specific reports not shown)

REQUIRED FOR ALL

PI # / Report Title	Purpose / Data Collected	Data Year	Open Date	Due Date	What is affected?	Impact
<b>COMPLETED BY ALL DISTRICTS (MANDATORY)</b>						
PI-1547 Transportation (Regular)	Ridership data for the regular school-year (number of pupils transported by mileage category)	2020-21	5/17/2021	8/13/2021	Regular Transportation Aid	January 2022 Transportation Aid Payment (not High Cost)
PI-1505 Calendar	Days and hours of instruction	2020-21	6/1/2021	8/13/2021	State Aid and Federal Reporting	N/A
PI-1505 Census	Data on the number of district residents ages 4 through 20 as of June 30, 2021	2020-21	6/1/2021	8/13/2021	Common School Fund-School Library Aid	April 2022 Common School Fund Payment
PI-1505 AC Aid Certification	District revenue/expenditure data: "preliminary" Annual Report to meet statutory deadline of September 1st	2020-21	7/12/2021	8/27/2021	General Aids Calculation	Oct. 15, 2021 and Final Gen. Equalization Aid (Spring 2022) Eligibility
PI-1506 AC AUDITOR Aid Certification	Auditor reported revenue/expenditure data: The District's PI-1505 Annual must match the PI-1506-AC Report	2020-21	7/12/2021	9/10/2021	General Aids Calculation	Oct. 15, 2021 and Final Gen. Equalization Aid (Spring 2022) Eligibility
PI-1506 FB AUDITOR Ending Fund Balance	District Fund Balance data, is an auditor report, but the district's Annual Report must match the PI-1506 FB report	2020-21	7/12/2021	9/10/2021	General Aids Calculation	Oct. 15, 2021 and Final Gen. Equalization Aid (Spring 2022) Eligibility
PI-1505 Annual Report	All district revenue/expenditure data: "complete" Annual Report	2020-21	7/12/2021	9/17/2021	State Aid and Federal Reporting	Validation of PI-1506 auditors' reports
PI-1505 SE Special Ed Annual	District detailed special education (Fund 27) expenditure data	2020-21	7/12/2021	9/17/2021	Special Education and School-Age Parents Aid; IDEA Maint. of Effort	2021-22 Spec Ed Aid payments; 2020-21 IDEA MOE compliance
WISEgrants	Final federal grant claims for 2020-21 (including ESSER/GEER programs)	2020-21	N/A	9/30/2021	Federal Grant Claim Revenue	Annual reporting, district financial statements
School Level Annual Report (WISFIP)	Financial Transparency Report of Per pupil expenditures by Location (ESSA)	2020-21	7/12/2021	10/1/2021	Federal Reporting Requirement for ESSA	ESSA Compliance
PI-1563 Pupil Count-September	MEMBERSHIP: 3rd Friday in September pupil count for Revenue Limit and General / Equalization Aid	2021-22	9/17/2021	10/1/2021	Equalization / General Aid and Revenue Limit	2021-22 Revenue Limit and 2022-23 General Equal. Aid
Tax Levy Report (WISFIP)	District's current year tax levies by fund	2021-22	10/15/2021	11/5/2021	2021-22 Revenue Limit	November 10 Levies Certification to Municipalities
WISEdata Finance Budget Snapshot	District's planned revenues & expenditures for the current year	2021-22	N/A	12/1/2021 (approx.)	N/A	Meets statutory budget report requirement
Financial Statements	Audited Financial Statements	2020-21	N/A	12/15/2021	State Aid and Federal auditing compliance	State Statutory Compliance
WISEgrants	Quarterly grant claims & reporting for ESSER & GEER programs (7/1/2021 through 9/30/2021)	2021-22	N/A	12/31/2021	ESSER & GEER Revenues	Federal reporting requirements on stimulus programs
PI-1563 Pupil Count-January	MEMBERSHIP: 2nd Friday in January pupil count for General / Equalization Aid	2021-22	1/14/2022	1/28/2022	Equalization / General Aid (not Revenue Limit)	2022-23 General Equalization Aid Eligibility
WISEgrants	Quarterly grant claims & reporting for ESSER & GEER programs (10/1/2021 through 12/31/2021)	2021-22	N/A	3/31/2022	ESSER & GEER Revenues	Federal reporting requirements on stimulus programs
WISEdata Finance Budget Snapshot	District's planned revenues & expenditures for the current year	2021-22	N/A	6/1/2022 (approx.)	General Aids	July 1 Estimate of General School Aids
WISEgrants	Quarterly grant claims & reporting for ESSER & GEER programs (1/1/2022 through 3/31/2022)	2021-22	N/A	6/30/2022	ESSER & GEER Revenues	Federal reporting requirements on stimulus programs

AS APPLICABLE

<b>COMPLETED BY DISTRICTS AS APPLICABLE</b>						
Energy Efficiency Reporting (will be moving to WISFIP)	To update utility savings for districts that issued debt under an energy efficiency resolution	2021-22	Always	9/1/2021	Revenue Limit	Calculation of the correct Revenue Limit exemption
PI-5000 Transfer of Service Part A	Formal request for a Transfer of Service Exemption to the Revenue Limit (including narrative requests)	2021-22	5/20/2021	9/17/2021	2021-22 Revenue Limit	Step 1 of 3 step process
PI-5000 Transfer of Service Part B	Confirmation of student information by other Wisconsin school districts	2021-22	5/20/2021	9/24/2021	2021-22 Revenue Limit	Step 2 of 3 step process
PI-5000 Transfer of Service Part C	Submission of Transfer of Service total requests	2021-22	5/20/2021	10/1/2021	2021-22 Revenue Limit	2021-22 Revenue Limit TOS Adjustment

# Fiscal Year at a Glance

YEAR AT A GLANCE: District Financial Reports Due to the DPI SFS Team 7/1/2021 to 6/30/2022 (select non-SFS reports shown in orange, other program-specific reports not shown)

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# Multi-Tasker Calendar

## SCHOOL FINANCE “Multi-tasker” PLANNING CALENDAR

Month of 2021-2022	Prior Fiscal Year Activities LAST YEAR	Current Fiscal Year Activities THIS YEAR	Future Fiscal Year Activities NEXT YEAR
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Items new, modified, or deleted for the 2021-2022 calendar are highlighted in yellow.


JULY/AUGUST	2020-2021	2021-2022	2022-2023
ANNUAL DPI REPORTS, DATA CERTIFICATIONS, REQUIREMENTS, and OTHER NOTIFICATIONS	<ul style="list-style-type: none"> <li>• PI-1547 Regular Transportation</li> <li>• PI-1505 Calendar</li> <li>• PI-1505 Census</li> <li>• PI-1505-AC Aid Certification</li> <li>• PI-1589 Group and foster home FTE log follow-up</li> <li>• Use PI-1504 Budget/SE data for IDEA Maintenance of Effort calculation</li> <li>• Final aid payment withholding June/July file posted to DPI payment webpage</li> <li>• Finalize collection of data for PI-5000 Transfer of Service Requests for students that plan to return in the fall</li> <li>• Review federal IDEA MOE Compliance Reports</li> </ul>	<ul style="list-style-type: none"> <li>• Review PI-1500 District Contacts</li> <li>• Review WiSFIP/WISEdata Finance access in WISEsecure</li> <li>• General Equalization Aid estimate released July 1<sup>st</sup></li> <li>• Use Summer Course information to complete the PI-1804 workbook (membership)</li> <li>• Reconcile summer fees in the PI-1804 workbook</li> <li>• Gather Summer Transportation ridership for PI-1547-SS</li> </ul>	

# Table Exercise



How do you organize  
your days, weeks,  
months, years

# Reports due in September

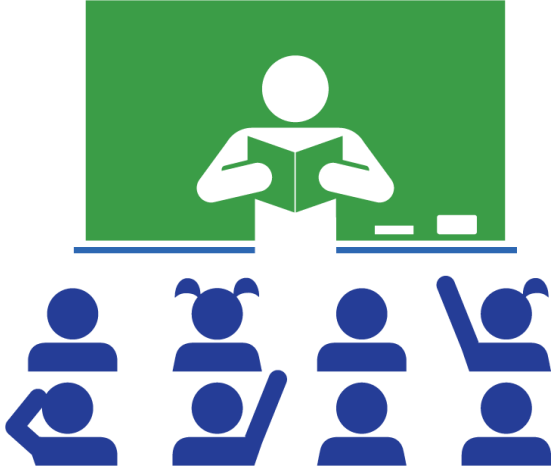
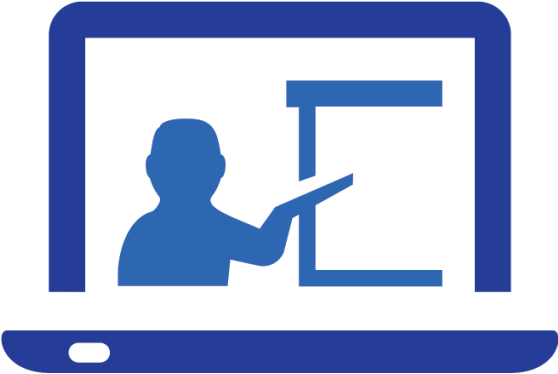
- **2021-22 Annual Reports**
  - **Transfer of Service**
  - **Third Friday 2021 Pupil Count**
  - **Final 2021-22 Grant Claims**
- 

# Where are you at with these reports?





# Third Friday of September Count



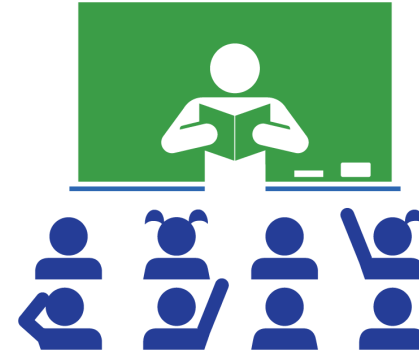
# Membership vs. Enrollment

## MEMBERSHIP



- Where kids live
- Drives district revenues

## ENROLLMENT



- Where kids learn
- Drives district expenses

# This Year Affects the Future

School Year	Funding Impacts
2020-21	Revenue Limit (1/3 of 3-year average membership) ...and Tax Levy  Per Pupil Aid (also uses 3-year average)
2022-23	General State Aids (last year's membership) and Revenue Limit (3-year average)...and Tax Levy  Per Pupil and Other Categorical State Aids
2023-24	Revenue Limit and Per Pupil Aid
2024-25	Revenue Limit (starts with comparison to the previous year's 3-year average)

# Revenue Limits

**A revenue limit restricts (controls) the amount of money a district can receive from:**

- **General State Aids (mostly Equalization Aid)**
- **High Poverty Aid**
- **Local Property Taxes**
- **Department of Revenue Exempt Computer and Personal Property Aids**

# General State Aids

**General State Aids are state funds within the revenue limit that partly offset your local tax levy.**

**Aid formula is a comparison of your district to the 420 others in Wisconsin.**



## How do you explain funding to:

- Staff
- Parents
- Community member

# Remember!

- **Revenue Limit membership:**  
3-year rolling average
- **Aid membership:**  
Last year's membership for this  
year's general school aids

# The Bottom Line - District Planning





# The Bottom Line – Community Impact



**General State Aids function as tax relief under the Revenue Limit.**

# More about Aid & Revenue Limits...

How is your district aided?

DPI Resource – Longitudinal Aid

[Multi-Year Aid: 2010-11 to current.](#)

# Required Reports to generate October 15 General Aids

Step #5

October 15 General Aid

Step #4

Due October 15 – School-Level Annual Report

Step #3

Due September 23: PI-1505 Annual Report & PI-1505-SE

Step #2

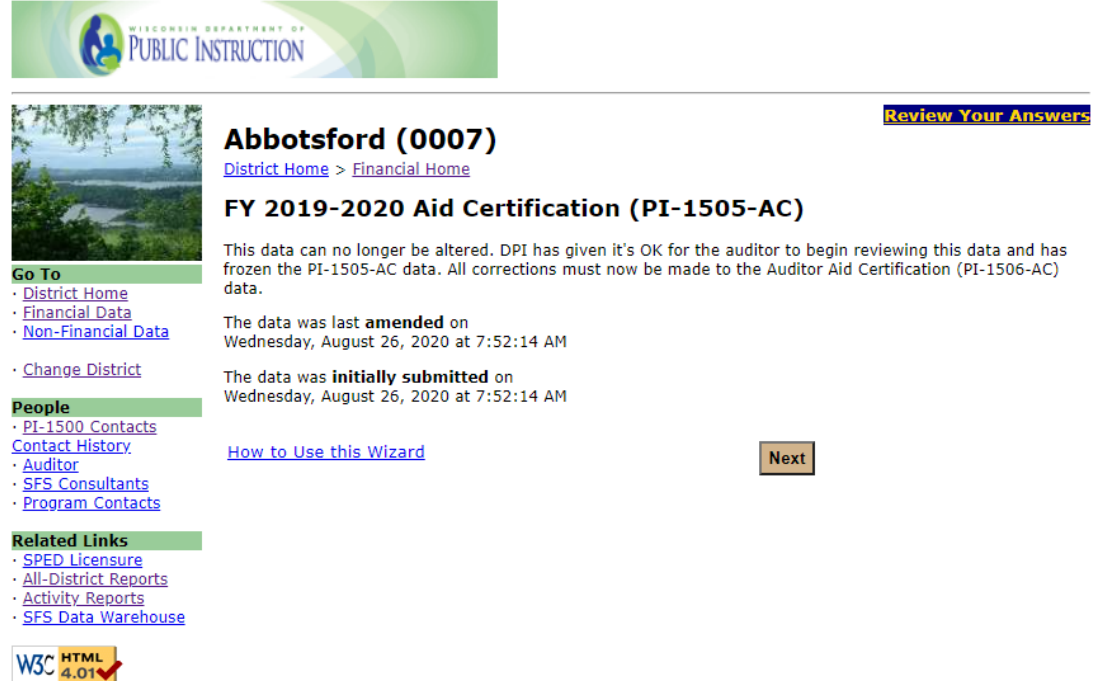
Due September 15: PI -1506 AC/FB Auditors Report

Step #1

Due August 26: PI-1505 AC Aid Certification

# PI-1505-AC Aid Certification

- Was due **Aug. 26**
- “Baby Annual Report” with data for Oct. 15 aid certification
- Auditor submits & compares the same for their PI-1506 reports



WISCONSIN DEPARTMENT OF PUBLIC INSTRUCTION

[Review Your Answers](#)

**Abbotsford (0007)**

[District Home](#) > [Financial Home](#)

**FY 2019-2020 Aid Certification (PI-1505-AC)**

This data can no longer be altered. DPI has given it's OK for the auditor to begin reviewing this data and has frozen the PI-1505-AC data. All corrections must now be made to the Auditor Aid Certification (PI-1506-AC) data.

The data was last **amended** on Wednesday, August 26, 2020 at 7:52:14 AM

The data was **initially submitted** on Wednesday, August 26, 2020 at 7:52:14 AM

[How to Use this Wizard](#)

[Next](#)

**Go To**

- [District Home](#)
- [Financial Data](#)
- [Non-Financial Data](#)

• [Change District](#)

**People**

- [PI-1500 Contacts](#)
- [Contact History](#)
- [Auditor](#)
- [SFS Consultants](#)
- [Program Contacts](#)

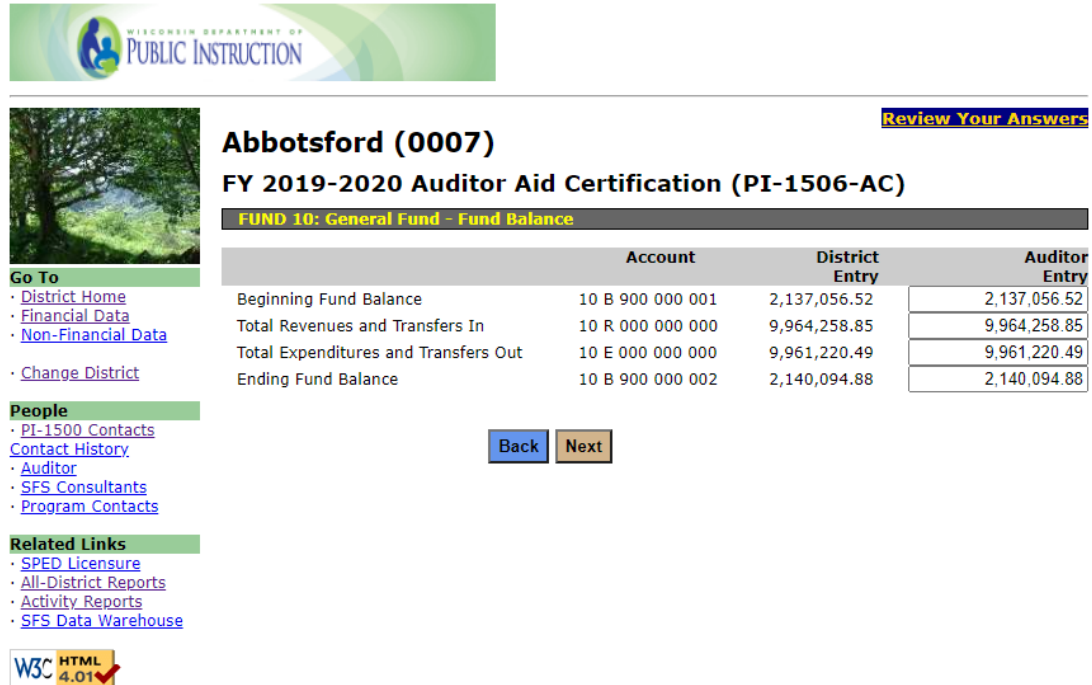
**Related Links**

- [SPED Licensure](#)
- [All-District Reports](#)
- [Activity Reports](#)
- [SFS Data Warehouse](#)

W3C HTML 4.01 ✓

# PI-1506-AC/FB Auditors' Reports

- You won't see these
- **Due Sept. 15**
- **Confirm/update your PI-1505-AC data**
- **Report ending fund balances & variance from audit statements**



WISCONSIN DEPARTMENT OF PUBLIC INSTRUCTION

[Review Your Answers](#)

## Abbotsford (0007)

FY 2019-2020 Auditor Aid Certification (PI-1506-AC)

**FUND 10: General Fund - Fund Balance**

	Account	District Entry	Auditor Entry
Beginning Fund Balance	10 B 900 000 001	2,137,056.52	2,137,056.52
Total Revenues and Transfers In	10 R 000 000 000	9,964,258.85	9,964,258.85
Total Expenditures and Transfers Out	10 E 000 000 000	9,961,220.49	9,961,220.49
Ending Fund Balance	10 B 900 000 002	2,140,094.88	2,140,094.88

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**People**

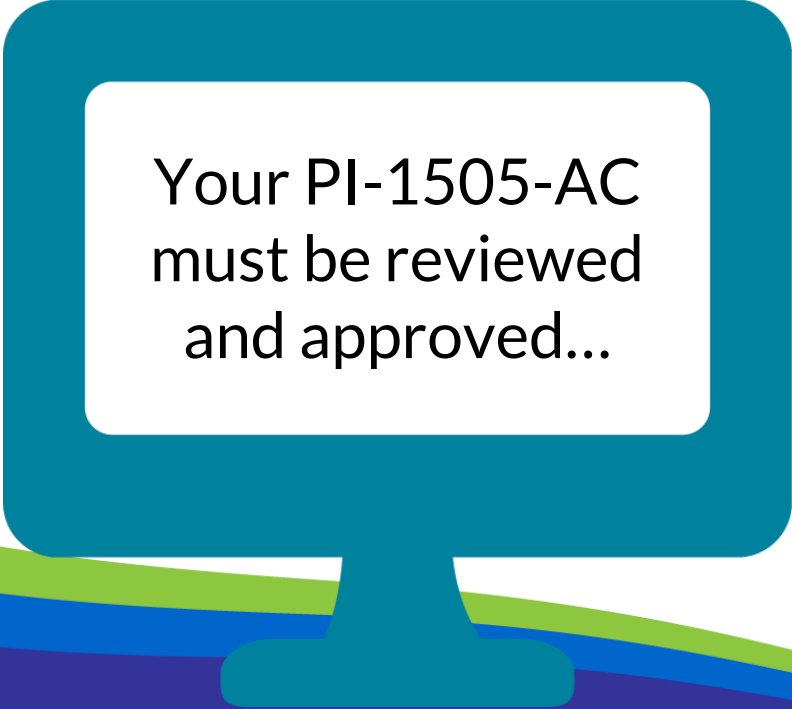
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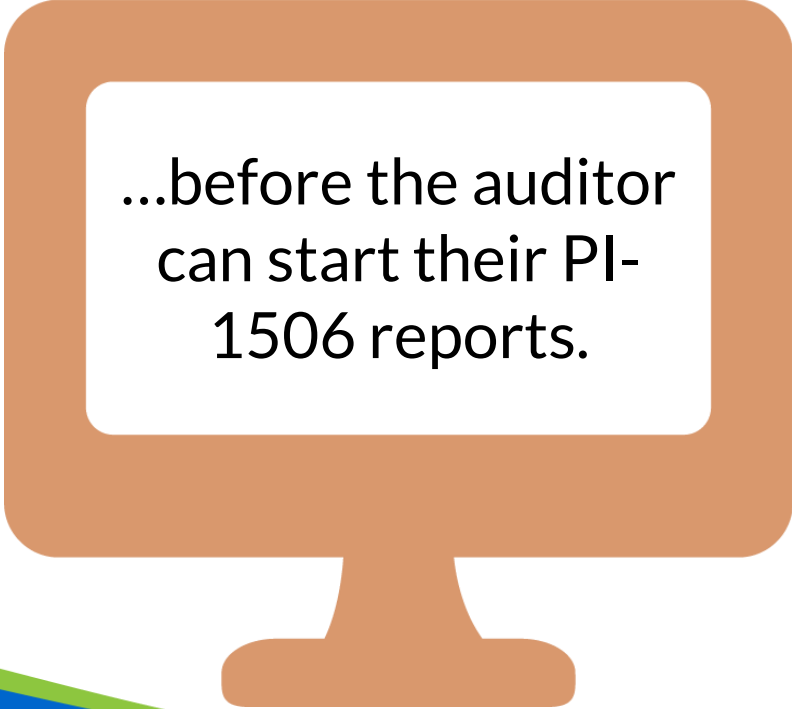
- [SPED Licensure](#)
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W3C HTML 4.01 ✓

# Tying It Together



Your PI-1505-AC  
must be reviewed  
and approved...



...before the auditor  
can start their PI-  
1506 reports.

# PI-1505 Annual Report

- Due on **Sept. 16**
- “Full Annual” with complete data for all funds
- Majority of your fall reporting work



## Reviewing the Data

- [Next Step](#)
- [View All Data](#)
- [Addenda](#)
- [Search for Accounts](#)
- [Audit Trail](#)
- [Debt Summary](#)

- [Contact History](#)
- [Backup Data](#)
- [Errors By Category](#)
- [Waivers](#)
- [Run Edits](#)
- [Copy to 1505AC](#)
- [Print Report \(PDF\)](#)

## Help & Information

- [On Record @ DPI](#)
- [Workbooks](#)
- [WUFAR](#)
- [SFS Consultants](#)

## Go To

- [All Annual Reports](#)
- [District Home](#)

- [Change District](#)

## Related Links

- [All-District Reports](#)
- [SFS Data Warehouse](#)



## Adams-Friendship Area (0014)

[Financial Data Home](#) > [All Annual Reports](#) > [FY 2019-2020 Next Step](#)

## All Accounts

[10](#) | [21](#) | [23](#) | [27](#) | [29](#) | [38](#) | [39](#) | [41](#) | [46](#) | [49](#) | [50](#) | [60](#) | [72](#) | [73](#) | [76](#) | [80](#) | [91](#) | [93](#) | [99](#) | [08](#) | [All](#)  
[Balance Sheet](#) | [Revenues](#) | [Expenditures](#) | [Addenda](#) | [Errors](#) | [All Accounts](#)



[PDF version](#) (may take a few minutes to load) [Show Data in Excel Format](#)

## Fund 10 Balance Sheet Accounts

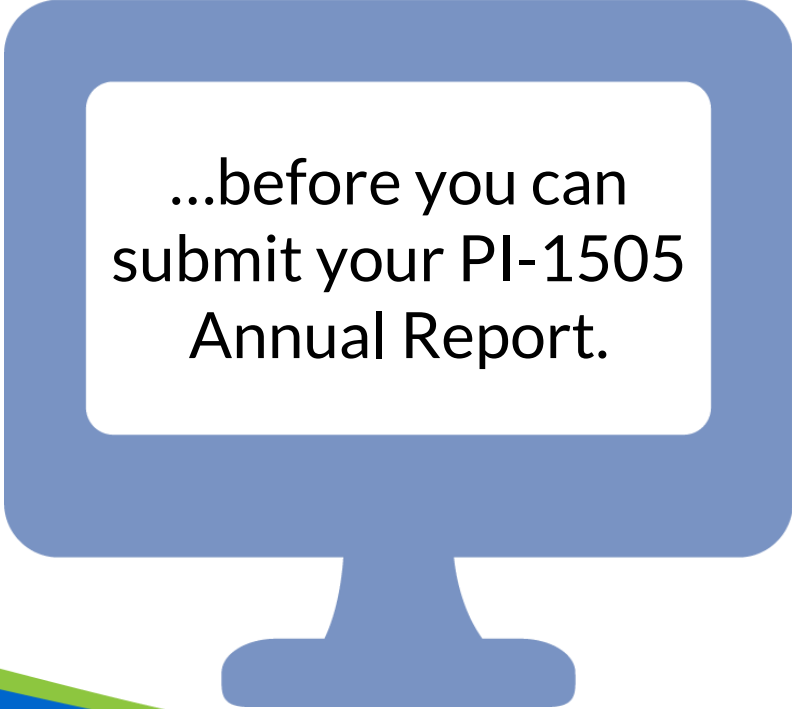
Attn?	Account Number	Description	Beginning of Year	End of Year
<b>700000 Assets</b>				
	<a href="#">10B-711000</a>	Cash	3,184,451.92	-237,278.90
	<a href="#">10B-712000</a>	Investments	24,342.99	2,629,582.53
	<a href="#">10B-713100</a>	Taxes Receivable	3,901,686.40	3,704,691.65
	<a href="#">10B-713200</a>	Accounts Receivable	3,284.90	1,850.57
	<a href="#">10B-713300</a>	Interest Receivable	0.00	56.72
	<a href="#">10B-715000</a>	Due From Other Governments	459,014.57	344,830.63
		<b>Total Assets (700000)</b>	<b>7,572,780.78</b>	<b>6,443,733.20</b>
<b>800000 Liabilities</b>				
	<a href="#">10B-811100</a>	Temporary Notes Payable	2,500,000.00	0.00
	<a href="#">10B-811200</a>	Accounts Payable	57,030.29	30,702.55
	<a href="#">10B-811600</a>	Payroll Withholdings and Benefits Payable	763,984.28	782,349.58
	<a href="#">10B-811700</a>	Accrued Temporary Note Interest Payable	1,248.61	0.00
	<a href="#">10B-815100</a>	Self-Funded Insurance Premium Deposits	19,736.65	21,311.47
	<a href="#">10B-816900</a>	Other Deferred Revenue	12,409.62	15,622.08
	<a href="#">10B-817000</a>	Health Benefit Claims Payable	14,909.00	8,899.00
		<b>Total Liabilities (800000)</b>	<b>3,369,318.45</b>	<b>858,884.68</b>
<b>900000 Fund Equity</b>				
	<a href="#">10B-026110</a>	Restricted for Self Insurance	102,065.84	201,202.01

ACCOUNT:

# Tying It Together



The auditor's PI-1506 reports must be approved...



...before you can submit your PI-1505 Annual Report.



# PI-1505-SE Special Ed Annual Report

- Also due **Sep. 17**
- Detail report for special education (Fund 27) expenses
- Used for state special education aid

Fiscal Year: 2020 Current Entity: Adams-Friendship Area (0014)

Main Menu Enter/Edit Data Errors Addenda Data Reports Submit

Selecting from the filter list dropdown (step 1) will automatically clear all account criteria listed in step 2 and retrieve the data from the option selected. To limit the retrieved data by account, enter account parameters in step 2 and click Go after step 1 has been done. Only 10 pages of data will display. Not all boxes need to be filled in and partial account numbers can be entered. Example: Enter 2 for 200 series objects.

Filter list of Accounts:  
 (Step 1) Limit Search to: Reported Values

Number of Errors: 0  
 Number of Warnings: 1

(Step 2) Fund Type - Function - Obj/Src - Project  
 Account Number:  -  -  -

#	Alert	Account	Description	Amount
1		27E-000000-000-000	All Functions--All Functions--Object 000--Not Project Specific	\$3,745,920.19
2		27E-150000-000-000	Summary - Special Education Curriculum	\$2,766,363.53
3		27E-152000-100-011	Early Childhood--Salaries-Local Aid-Eligible	\$30,500.22
4		27E-152000-100-340	Early Childhood--Salaries-Direct IDEA Grant	\$16,000.00
5		27E-152000-212-011	Early Childhood--Employer's Share-Local Aid-Eligible	\$1,740.72
6		27E-152000-212-340	Early Childhood--Employer's Share-Direct IDEA Grant	\$1,365.78
7		27E-152000-219-011	Early Childhood--Other Employee Benefits-Local Aid-Eligible	\$3,000.00
8		27E-152000-220-011	Early Childhood--Social Security-Local Aid-Eligible	\$1,600.60
9		27E-152000-220-340	Early Childhood--Social Security-Direct IDEA Grant	\$1,205.40
10		27E-152000-230-011	Early Childhood--Life Insurance-Local Aid-Eligible	\$4.34
11		27E-152000-230-340	Early Childhood--Life Insurance-Direct IDEA Grant	\$3.72
12		27E-152000-240-011	Early Childhood--Health Insurance-Local Aid-Eligible	\$21,444.12
13		27E-152000-240-340	Early Childhood--Health Insurance-Direct IDEA Grant	\$2,864.26

# Tying It Together

IDEA grant costs  
must match



PI-1505-SE detail  
must match the full  
PI-1505 Annual

# More about Annual Reports coming up...

**Q: Why did we cover these slides?**

**A: All of these reports build to the calculation  
of the October 15 General Aids**



# School Level Annual Report

- **Due on Oct. 1**
- **Expenditures only broken down by**
  - School or District
  - Federal or State/Local
  - Funded
  - “Exclusions”
- **Used for federal ESSA per pupil reporting**

## District/LEA Data

Enrollment	Exclusions	Federal	State/Local	Total
1,198	\$8,135,921	\$441,374	\$5,091,537	\$13,668,832

## School Data

Location	Enrollment	Federal	State/Local	Total
Advanced Learning Academy of Wisconsin	49	\$0	\$347,673	\$347,673
Almena Elementary	39	\$63,265	\$421,996	\$485,261
Barron Area Montessori School	32	\$0	\$318,733	\$318,733
Barron High	359	\$5,524	\$3,850,321	\$3,855,845
North Star Academy	0	\$0	\$98,519	\$98,519
Ridgeland-Dallas Elementary	78	\$0	\$545,374	\$545,374
Riverview Middle	339	\$4,638	\$2,645,964	\$2,650,602
Woodland Elementary	302	\$281,717	\$2,477,232	\$2,758,949
<b>Totals:</b>	<b>1,198</b>	<b>\$355,144</b>	<b>\$10,705,812</b>	<b>\$11,060,956</b>

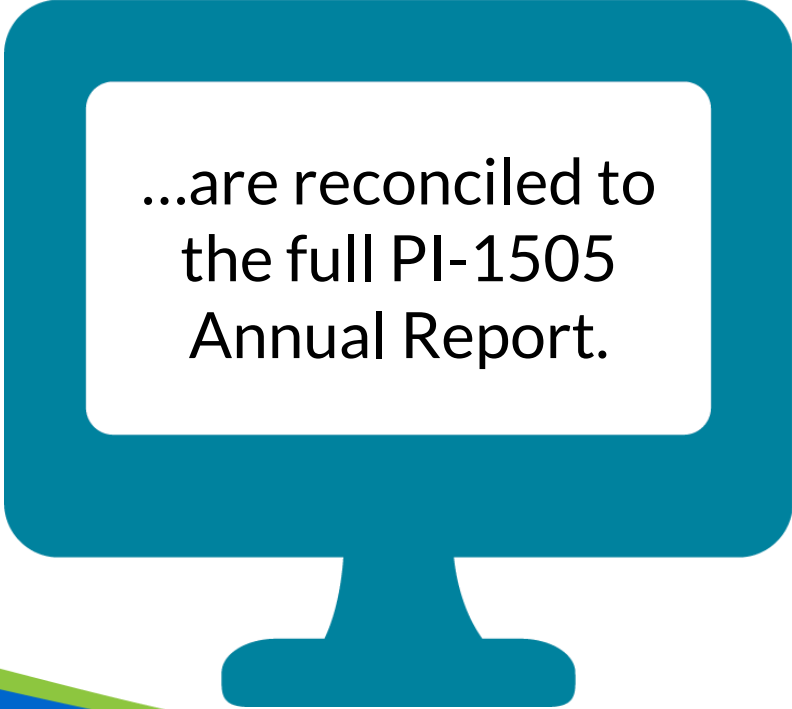
**Grand Total: \$24,729,788**

Finalize Report

# Tying It Together



School Level Report  
total, exclusions &  
federal costs...



...are reconciled to  
the full PI-1505  
Annual Report.

# Annual Report Reviews

- **DPI review including reconciling data**
- **DPI may identify errors in your SE data**
- **DPI may request additional information**
- **Changes in one district may impact another**
- **All changes must be made by February**
- **Timely responses are important for all to meet the deadline**

# Financial Reports

- September Pupil Count
- Tax Levy



#### Go To

- [District Home](#)
- [Financial Data](#)
- [Non-Financial Data](#)

- [Change District](#)

#### People


- [PI-1500 Contacts](#)
- [Contact History](#)
- [Auditor](#)
- [SFS Consultants](#)
- [Program Contacts](#)

#### Related Links

- [SPED Licensure](#)
- [All-District Reports](#)
- [Activity Reports](#)
- [SFS Data Warehouse](#)



## Abbotsford (0007)

- [Introduction](#)  
A note from the Director
- [Status & Due Dates](#)   
Information on district data entry and upcoming deadlines
- [Financial Data Home](#)  
Includes the PI-1505 Full Financial Report
- [Non-Financial Data Home](#)  
Pupil Count (Summer, September, January), Pupil Transportation, School Calendar, School Census, Challenge Academy
- [FTE Reports](#)
- [PI-1500 Contacts Report](#)  
Identify specific district staff for report submission authorization
- [District Contact History](#)  
Report Submission History
- [Auditor](#)  
Information on the auditor and audit firm of the district  
Special Education Licensure information for auditors

# The Future is Here

## WISEdata Finance

The screenshot shows the WISEdata Finance web application. At the top, there is a navigation bar with links for Home, Data Reviews, Account Reviews, Validation Messages, Admin, Settings, and a user profile for Daniel B (Wis Dept of Public Instruction). Below the navigation bar, there is a 'Validation Message Summary' section for the School Year 2020. It displays a table with three rows: 'Data Format L2 Validation Count' (0), 'Budget L2 Validation Count' (0), and 'Actual L2 Validation Count' (0). Below this is a 'Data Pipeline Status' section for the School Year 2019 - 2020, showing a 'Vendors' dropdown menu. A 'Vendor / WISEdata Communication Status' section is expanded, providing instructions on how to use the vendor communication status to alert users of specific vendor communication issues within the last 24 hours.

Finance data reported just like student data, directly from your data system


## WiSFIP

The screenshot shows the Wisconsin School Finance Portal (WiSFIP) interface. At the top, there is a header with the Wisconsin Department of Public Instruction logo and navigation links for SFS WiSFIP, Applications, and Links. Below the header, there is a 'Welcome!' section with a brief introduction to the portal and a 'Start App' button for 'Chapter 220 Administration'. To the right, there is a 'Portal Announcements' section with a 'School Level Reporting OPEN for Annual 2019-20 Report' announcement. Below the announcements, there is a 'School Level Reporting' section with a 'Start App' button and a 'We invite your comments and suggestions' section with a 'Start App' button.

Reports compiled from WISEdata Finance and additional information you provide



# What's Next? Membership!

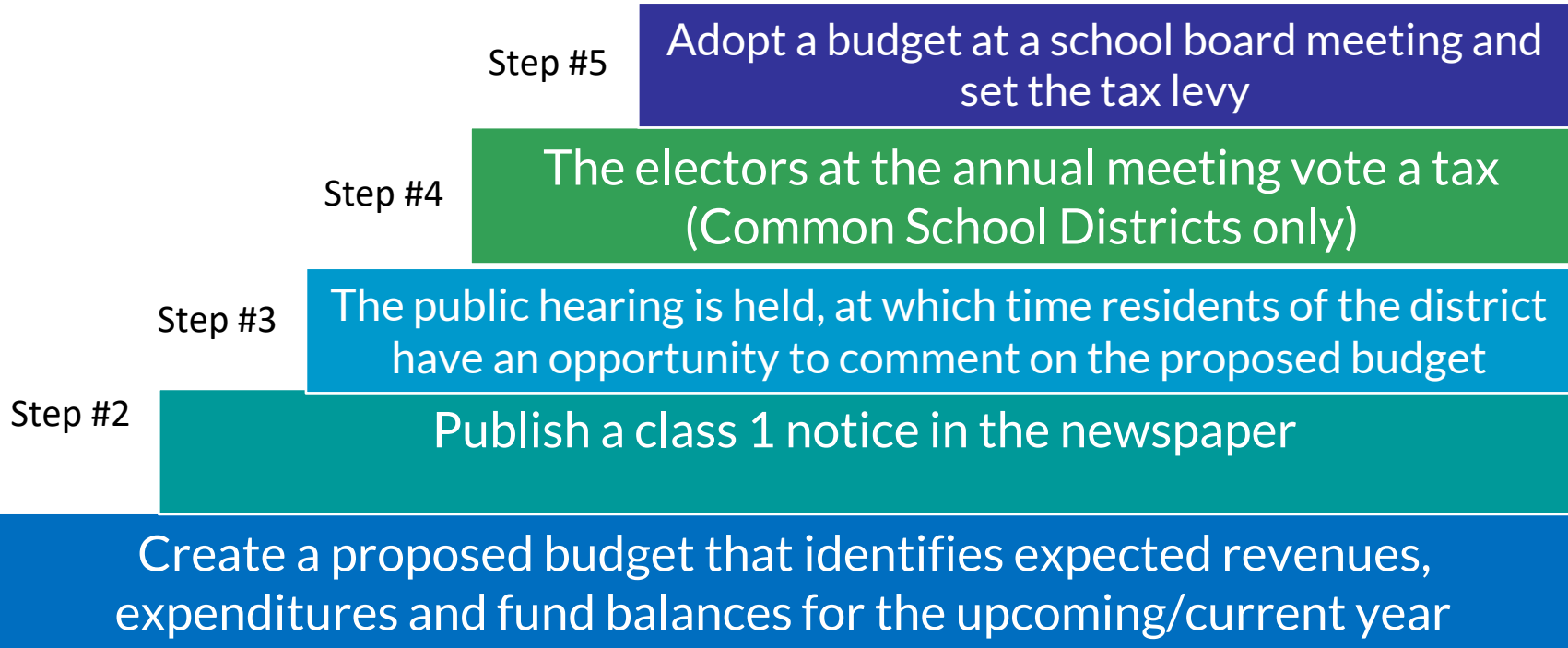
- **Federal SLDS Grant is funding development of membership reporting & parental choice tools with WISEdata (Student)**
  - **Our goal is to retire SAFR in 2023**
- 

# Budget to Tax Levy...



WISCONSIN DEPARTMENT OF  
**Public Instruction**  
Jill K. Underly, PhD, State Superintendent

# Overview: Budget Adoption and Tax Levy



# Budget Adoption

The school board shall adopt a budget at a school board meeting after the public hearing and no later than the meeting in which the tax levy is set. This is sometimes referred to as the “original” budget.

**Deadline November 1<sup>st</sup>**

Step #5

Adopt a budget at a school board meeting and set the tax levy

# Contacting the SFS Team

- Email: [dpifin@dpi.wi.gov](mailto:dpifin@dpi.wi.gov)
- Phone: (608) 267-9114
- Web: [dpi.wi.gov/sfs](http://dpi.wi.gov/sfs)

Team Directory:

[dpi.wi.gov/sfs/communications/staff-directory](http://dpi.wi.gov/sfs/communications/staff-directory)

# My Contact Information

- **Mark Elworthy**

Director

DPI School Financial Services Team

[mark.elworthy@dpi.wi.gov](mailto:mark.elworthy@dpi.wi.gov)

(608) 266-9534

# Recommended DPI Bookmarks

- **SFS Team Page and Assignments**
- **Sign-up for the Newsletter**
- **Year at a Glance and Planning Doc**
- **SAFR Portal**
- **Comparative Costs per member**
- **PI 1500 Contacts**