Sample Annual Calendar

It is important for an administrator to know when human resource responsibilities need to be performed in order to plan for the daily, weekly, monthly, or annual demands that will be placed on the department. Determining the needs of the district is the first step in establishing a department calendar. One way to do this is to review board agenda items for each month of the previous year, noting when particular items were presented to the board for consideration and action. This information can then be used to meet essential deadlines.

The chart below is an example of how major responsibilities can be organized into an annual calendar. Administrators can edit this list to meet their needs and fit the district’s actual practice. Some activities may need to be shifted to align with the district’s fiscal year (e.g., salary- and payroll-related activities).

**MONTHLY HR DEPARTMENT ACTIVITIES**

<table>
<thead>
<tr>
<th>Month</th>
<th>Employee Relations</th>
<th>Staffing/Employment</th>
<th>Compensation/Benefits</th>
<th>Records/Reporting</th>
<th>Employee Appraisal</th>
<th>Other</th>
</tr>
</thead>
</table>
| July  | • Post/print updated employee handbooks  
     • Prepare and distribute materials for beginning of year meetings and activities  
     • Complete hiring of professional staff (through August)  
     • Begin substitute interviewing and selection  
     • Calculate board-approved salary increases and submit to payroll  
     • Distribute salary notification to employees before contract resignation deadline  
     • Complete superintendent salary survey and submit to TASB HR Services (due early Sept.)  
     • Purge personnel files  
     • Plan and schedule professional growth activities for department staff for the year  
     • Update HR Web Site | | | | | | |
<table>
<thead>
<tr>
<th>Month</th>
<th>Employee Relations</th>
<th>Staffing/Employment</th>
<th>Compensation/Benefits</th>
<th>Records/Reporting</th>
<th>Employee Appraisal</th>
<th>Other</th>
</tr>
</thead>
</table>
| August | • Conduct beginning of the year meetings (e.g., new employee, student teacher, and substitute orientation; districtwide meetings) | • Finalize Fall recruitment calendar and register for job fairs  
 • Update, print, and order recruiting materials | • Conduct open enrollment for health and other benefit plans | • Process new hire certificates and credentials  
 • Identify all teachers and paraprofessional not meeting the NCLB highly qualified standards  
 • Prepare annual NCLB parent notice for distribution (Right to Request Teacher Qualifications) | • Distribute annual PDAS calendar to all appraisers and teachers  
 • Conduct PDAS training for new teachers (deadline: last day of first three weeks of school and at least three weeks prior to observation)  
 • Conduct PDAS update training for administrators | |
| September | • Conduct campus visits to reinforce HR service and support  
 • Arrange pre-retirement seminars with TRS | • Rebalance staffing allocations among campuses  
 • Analyze recruiting, turnover, and exit data from prior year  
 • Determine optimal timing to conduct employee climate survey and make preparations | • Complete TASB salary survey for teachers, administrators, and auxiliary employees (due mid-October) | • Complete data entry and audits of payroll/personnel records  
 • Distribute NCLB or SBEC parent notification of inappropriately or noncertified teachers | • Distribute evaluation instruments to all administrative staff for distribution and discussion with new hires  
 • Meet with principals and supervisors regarding evaluation procedures and timelines | • Renew membership to TASB HR Services |
<table>
<thead>
<tr>
<th>Month</th>
<th>Employee Relations</th>
<th>Staffing/Employment</th>
<th>Compensation/Benefits</th>
<th>Records/Reporting</th>
<th>Employee Appraisal</th>
<th>Other</th>
</tr>
</thead>
</table>
| October |                  | • Arrange for Spring semester student teacher assignments |                      | • Review all new hire personnel files for complete records  
• Collect, enter and verify PEIMS staff data (Snapshot date: last Friday in October. See TEA Web Site for due dates)  
• Complete Highly Qualified Teacher Compliance Report to TEA (due mid-November)  
• Complete EEO-5 reports (generally due by November 30, in even numbered years) |                      |                  |
<table>
<thead>
<tr>
<th>Month</th>
<th>Employee Relations</th>
<th>Staffing/Employment</th>
<th>Compensation/Benefits</th>
<th>Records/Reporting</th>
<th>Employee Appraisal</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>November</td>
<td>• Check in with beginning teachers</td>
<td>• Gather input from principals on projected staffing needs</td>
<td>• Complete TASB extra-duty stipend survey (due in November)</td>
<td>• PEIMS Fall Data Collection submission (submit to TEA in December)</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Develop Spring recruitment calendar</td>
<td></td>
<td>• Revise and complete Highly Qualified Teacher Continuous Improvement Plan and Focused Data Analysis (submit to TEA in December, if required)</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• Assist principals with completing NCLB principal attestation of staff qualifications (due mid-December)</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• Complete Educator Retention and Shortage Area Survey (due to TEA in January)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Month</td>
<td>Employee Relations</td>
<td>Staffing/Employment</td>
<td>Compensation/Benefits</td>
<td>Records/Reporting</td>
<td>Employee Appraisal</td>
<td>Other</td>
</tr>
<tr>
<td>--------</td>
<td>-----------------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------</td>
<td>--------------------</td>
<td>-------</td>
</tr>
<tr>
<td>December</td>
<td>• Recognize any mid-year retirees</td>
<td></td>
<td></td>
<td>• Check mail during holiday break for unemployment filings and respond as needed</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• Post Public Report of Progress in Meeting Highly Qualified Teacher Requirements</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• Update Highly Qualified Teacher Compliance Report</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>(due early January)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>January</td>
<td>• Review and report results of employee climate survey</td>
<td>• Prepare preliminary enrollment and staffing projections</td>
<td>• Review TASB salary survey results on line at hrservices.tasb.org and prepare salary schedule recommendations</td>
<td>• PEIMS Mid-Year Data Collection Submission Analysis (submit to TEA in February)</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Conduct student teacher orientation</td>
<td></td>
<td>• Send reminder letters to certified employees hired from out-of-state to complete certification requirements</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Distribute transfer procedures to employees and begin ongoing distribution of transfer lists to principals and other interested parties</td>
<td></td>
<td>• Send information regarding general eligibility requirements for the federal earned income tax credit to all employees (must be sent by March 1)</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Finalize Spring recruiting schedule, make arrangements, and order supplies</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Month</td>
<td>Employee Relations</td>
<td>Staffing/Employment</td>
<td>Compensation/Benefits</td>
<td>Records/Reporting</td>
<td>Employee Appraisal</td>
<td>Other</td>
</tr>
<tr>
<td>-------</td>
<td>--------------------</td>
<td>---------------------</td>
<td>----------------------</td>
<td>------------------</td>
<td>-------------------</td>
<td>-------</td>
</tr>
</tbody>
</table>
| February | ● Begin Spring college and university recruiting trips  
● Distribute reminder to all professional staff to submit early notice of intent to resign at the end of the school year | ● Prepare comparable health insurance coverage reports (only non-Active Care districts in even-numbered school years; Web posting and TRS report due March 1) | | | ● Meet with principals to review preliminary list of potential contract nonrenewals and provide assistance with documentation | |
| March | ● Finalize staffing plans  
● Discuss transfer and reassignment requests with teachers and principals and create transfer request list  
● Continue recruiting activities | | ● Prepare preliminary budget requests for department  
● Check mail during Spring break for unemployment filings and respond as needed | | | |
| April | ● Submit contract renewal and nonrenewal recommendations with relevant appraisals to the Board  
● Complete college and university recruiting activities  
Distribute reasonable assurance letters to noncontract staff | ● Prepare salary schedules and pay raise recommendations  
● Conduct Spring open enrollment for TRS Active Care (check TEA Web Site for dates) | | ● Complete preliminary budget recommendations  
● Submit criminal history compliance certification to TEA (online survey) | | |
<table>
<thead>
<tr>
<th>Month</th>
<th>Employee Relations</th>
<th>Staffing/Employment</th>
<th>Compensation/Benefits</th>
<th>Records/Reporting</th>
<th>Employee Appraisal</th>
<th>Other</th>
</tr>
</thead>
</table>
| May   | • Hold student teacher reception  
      • Hold retirement banquet  
      • Distribute nonrenewal and termination notices (ensure distribution date meets 10-day notice requirement)  
      • Follow-up on renewed contracts that have not been returned | • PEIMS Summer Data Collection Submission (due to TEA in June)  
      • Final collection of all completed employee appraisals and updated job descriptions | |
| June  | • Update employee handbook  
      • Update projected vacancy list for July and August  
      • Complete processing of transfers and reassignments | • Present salary schedule and pay increase recommendations to the board  
      • Review and update department operating procedures and forms  
      • File completed appraisals and job description updates  
      • Order work-site posters for new campuses and facilities | • Finalize budget  
      • Update Highly Qualified Teacher Compliance Report (due early June)  
      • Update PDAS appraisal calendar and obtain board approval of the calendar and other appraisers, if any |
<table>
<thead>
<tr>
<th>Month</th>
<th>Employee Relations</th>
<th>Staffing/Employment</th>
<th>Compensation/Benefits</th>
<th>Records/Reporting</th>
<th>Employee Appraisal</th>
<th>Other</th>
</tr>
</thead>
</table>
| Ongoing | • Process employee complaints and grievances  
• Verify years of service for service awards and prepare for recognition ceremonies  
• Post job vacancies  
• Conduct applicant screening and manage selection process  
• Process new hires and submit new hire reports  
• Conduct new employee orientation  
• Manage the substitute calling and selection system and monitor fill rates  
• Oversee the processing of teacher certificates and permits; monitor expiration of standard certificates and send reminders to certified employees | • Monitor employee turnover and collection of exit survey  
• Apply procedures to determine starting pay for new hires | • Oversee salary, benefits, and leave administration  
• Apply procedures to determine starting pay for new hires | • PEIMS data collection submissions  
• Apply procedures to determine starting pay for new hires  
• Process criminal background checks  
• Comply with HR-related public information requests  
• Create, file, maintain, and secure personnel records | • Support principals with employee performance issues and monitor appraisal process | • Review and develop personnel policy recommendations and practices  
• Provide principals and department directors with data to manage human resources  
• Provide management development training for principals and supervisors |

Back to Top

This information is provided for educational purposes only to facilitate a general understanding of the law or other regulatory matter. This information is neither an exhaustive treatment on the subject nor is this intended to substitute for the advice of an attorney or other professional advisor. Consult with your attorney or professional advisor to apply these principles to specific fact situations. © 2013 Texas Association of School Boards, Inc. All rights reserved.