

# SCHOOL FINANCIAL SERVICES TEAM

## SFS Finance Newsletter

A Newsletter from the Wisconsin Department of Public Instruction, Division for Finance and Management



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[Print PDF Format](#)

September 4th,

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### PI 1563 September Pupil Count Report Information

Please route the following information to the individual(s) who complete the PI 1563 September Pupil Count Report for your district. The pupil count date is Friday, September 18, and the report is due Friday, October 2.

The PI 1563 Internet Pupil Count Report program will open for district data entry on Friday, September 18. Districts can access this report by clicking on the "School Finance Reporting Portal" link and then proceeding to the district's home page. Click on either the "Status and Due Dates" or "Non-Financial Data Home" link to access the report. Resources are available to assist districts in generating the pupil count data. Pupil count report instructions and a worksheet are available on the team's website at: <http://dpi.wi.gov/sfs/membrpt2.html>. In addition, a webcast entitled "Counting Students for the PI 1563 Pupil Count Report" is on the finance team's home webpage under "Webcast Presentations" or directly at:

<http://media2.wi.gov/DPI/Viewer/?peid=e7d81857-5e79-4992-b951-0366fcdf816f>. The team encourages district staff responsible for the PI 1563 report to review these resources as they reflect the steps districts will follow to report students on the report.

If your district is unable to hold school on September 18, a request for an alternative pupil count date must be submitted to the state superintendent (s. 121.05(3), Wis. Stats.). Address your request to Debbie Gaffney Dilley, School Financial Services Team, at [debra.gaffney-dilley@dpi.wi.gov](mailto:debra.gaffney-dilley@dpi.wi.gov). Please specify the alternative date that you are requesting. In most circumstances, the date should be either the Thursday before or the Monday after the Friday count date.

September 2009						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

Sep 2	<a href="#">SAGE Aid Payment</a>
Sep 4	<a href="#">September 4 Newsletter</a>
Sep 4	<a href="#">PI 1505 SPED Report Due</a>
Sep 18	<a href="#">September Third Friday Count Date</a>
Sep 21	<a href="#">PI 1506 AC Due</a>
Sep 21	<a href="#">September Equalization Aid Payment</a>
Sep 21	<a href="#">Sparsity Aid Payment</a>

October 2009						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

Oct 2	<a href="#">PI 1505 Annual Report Due</a>
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## New 2009-10 Energy Revenue Limit Exemption

2009 Wisconsin Act 28, the 2009-11 biennial budget bill, created a revenue limit exemption that allows a school district to increase its revenue limit by the amount spent by the school district in that school year on energy efficiency measures, and renewable energy products, that result in the avoidance of, or reduction in, energy costs.

This exemption requires the department to establish eligibility standards and procedures for school districts to follow when implementing revenue limit exemptions for energy efficiency measures. The emergency rule and the proposed administrative rule (PI Chapter 15) are located on the department's policy and budget team website or directly at <http://dpi.wi.gov/pb/pdf/revlimitem.pdf>.

Below is an outline of the requirements school districts must follow in order to use this exemption to the revenue limit.

School boards of the school districts are required to:

1. Identify the specific new expenditures.
2. Identify the performance indicators to measure the cost savings that will occur as a result of the expenditures. A cost savings analysis is required.
3. Identify the period of time in which the expenditure will be recovered by the cost savings.
4. Pass a resolution with specified information by November 1 in the school year in which a tax is to be levied for the expenditure.
5. Submit a copy of the resolution to the department within two weeks of passage.
6. Add the amount of the proposed levy to line 10D of the Revenue Limit worksheet.
7. Levy the amount specified in the resolution when establishing its tax levies.
8. Incur the expenditure authorized in its resolution.
9. At the end of the 2009-10 school year, prepare an addendum to the 2010-11 budget summary that reports the results of the energy savings incurred as a result of the expenditure.
10. No later than two weeks following the date of the school district's 2010-11 budget hearing, submit to the department the contents of the addendum to the school district's published budget summary.
11. Reduce the school district's following year's revenue limit by the amount of any additional revenue received as a result of the exemption and by the amount levied for which there is not a documented energy expenditure, if applicable.

In addition, the department is required to:

1. Post on its website all the resolutions received by school districts. More details to follow on this reporting requirement.
2. Adjust a school district's revenue limit to include the levy amount specified in the resolution.
3. Post on its website the addendum contents received from school districts.
4. Reduce a school district's revenue limit for the following year by the amount of any additional revenue received as a result of the exemption.
5. Reduce the school district's revenue limit for the following year by an amount the school district levied for which there is not a documented expenditure authorized under the exemption, if applicable.

Please contact a school finance consultant if you have questions.

Oct 2	<a href="#">PI 1804-1805 Summer School Report Due</a>
Oct 2	<a href="#">PI 1563 Pupil Count Report Due</a>
Oct 2	<a href="#">PI 1524 State Tuition Report Due</a>
Oct 2	<a href="#">PI 1588 Supplemental Aid Request Due, s. 115.435, Wis. Stats</a>
Oct 12	<a href="#">Department Closed With the Exception of Finance Team</a>
Oct 12	<a href="#">Department of Public Instruction Furlough Day</a>
Oct 16	<a href="#">Equalization Aid Certification Posted to Internet</a>
Oct 30	<a href="#">School Financial Services Team Furlough Day</a>

November 2009						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

Nov 6	<a href="#">Indirect Cost Report Due</a>
Nov 6	<a href="#">Last Day to Certify Levies to Municipalities</a>
Nov 13	<a href="#">PI 401 Tax Levy Report Due</a>
Nov 16	<a href="#">State EEN Aid Payment</a>
Nov 16	<a href="#">Improving Pupil Academic Achievement, s.115.395, Wis. Stats.</a>

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### PI 1547 Pupil Transportation Report - Summer 2009

The 2009-2010 PI 1547 Pupil Transportation Report will open for summer school 2009 data entry on September 4, 2009. This report is only opened for entry into the "Report Contact" and the "Pupils Transported to Summer School" pages to provide access when 2009 summer school data is more readily available. The report will have to be submitted after it is reopened for regular school year data entry in the summer of 2010. Districts can access this report by clicking on the "School Finance Reporting Portal" link and then proceeding to the district's home page. Click on either the "Status and Due Dates" or "Non-Financial Data Home" link to access the report.

The complete PI 1547, including the data for the regular 2009-2010 school year, is due August 1 following the close of your fiscal year; however, districts are encouraged to complete the summer school portion now when the information has been recently collected.

If you have questions contact Pam Schumacher at [pamela.schumacher@dpi.wi.gov](mailto:pamela.schumacher@dpi.wi.gov) or (608) 267-9205.

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### PI 1505 Full Financial Annual Report and Unresolved Contracts

The district's 2008-2009 Annual Report (PI 1505 AC and PI 1505) may include payroll and related benefit costs only to the extent that they are associated with implemented bargaining agreements. Implementation must occur by the October 1 following the June 30 fiscal year end (s. 120.18(1) (gm), Wis. Stats.).

If the district and an employee bargaining unit do not have an implemented agreement, the recording of any increased costs above the most recent agreement is limited to the lower of the district's or bargaining unit's final offers submitted under the Wisconsin Employment Relations Commission (WERC) binding arbitration rules [http://dpi.wisconsin.gov/sfs/doc/unsettled\\_contract.doc](http://dpi.wisconsin.gov/sfs/doc/unsettled_contract.doc). If a change in employee contract status occurs after report filing, but prior to October 1, contact one of the auditors Gene Fornecker [eugene.fornecker@dpi.wi.gov](mailto:eugene.fornecker@dpi.wi.gov) or (608) 267-7882, Kathy Guralski [kathryn.guralski@dpi.wi.gov](mailto:kathryn.guralski@dpi.wi.gov) or (608) 266-3862 or Natalie Rew [natalie.rew@dpi.wi.gov](mailto:natalie.rew@dpi.wi.gov) or (608) 267-9212, immediately. The department will use the estimated additional settlement cost in determining the district's October 15 certified aid amount.

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### September 24 Indirect Cost Mailing

School districts may charge administrative costs to Federal grants and contracts; however, in most cases, districts do not receive additional money. Districts interested in charging an indirect cost should review the contents of the upcoming September 24

Newsletter. This information will be available under "Indirect Cost" on the left hand scan bar of the team's website, under "Late Breaking Information" or directly at <http://www.dpi.state.wi.us/sfs/indirect.html>. Additional questions may be directed to Gene Fornecker at [eugene.fornecker@dpi.wi.gov](mailto:eugene.fornecker@dpi.wi.gov) or (608) 267-7882.

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### **PI 1588 Supplemental Aid with Large Area Report**

Supplemental Aid for School Districts with a Large Area is an annual entitlement program authorized under s. 115.435, Wis. Stats. Applications and further information regarding the eligibility requirements can be found at the following link: <http://dpi.wi.gov/sfs/supaid1.html>.

Application form PI 1588 for this program is due October 15. Contact Brad Adams at [bradley.adams@dpi.wi.gov](mailto:bradley.adams@dpi.wi.gov) or (608) 267-3752 should the district have questions.

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### **NEW "LONGITUDINAL DATA" LINK ON THE SFS WEBPAGE GREEN SCAN BAR**

Districts wanting to print some longitudinal data for their annual meeting book and have had trouble locating longitudinal graphs presented at the Spring Finance Workshop may now do so from a link on the team's website? A new link to the Green Scan Bar on the SFS Homepage entitled "Longitudinal Data" houses the many SFS longitudinal Excel spreadsheets that had previously been located under the "Budget Development and Planning" on the main SFS menu.

The old "Budget Development and Planning" link will remain in place for a short time as users learn the new location, but it will just have a redirect statement to the new scanbar button and contain no data. The SFS Team continually evaluates the user-friendliness of our website and welcomes your suggestions and comments.

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## **School Financial Services Contacts**

Please contact one of the following School Financial Services Team consultants should you have questions:

Brad Adams	<a href="mailto:bradley.adams@dpi.wi.gov">bradley.adams@dpi.wi.gov</a>	(608) 267-3752
Lori Ames	<a href="mailto:lori.ames@dpi.wi.gov">lori.ames@dpi.wi.gov</a>	(608) 266-3464
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