

Budget Development Process 2007/08

TASK			
Item	Action No.	Required	Completed
Ministry of Education announces education funding for 2007/08		01-Feb	01-Feb
SD48 Funding Allocation System	3	01-Feb	01-Feb
Enrolment projections	1	09-Feb	09-Feb
Enrolment projections	1	14-Feb	14-Feb
Budget Development Process		14-Feb	14-Feb
SD48 Funding Allocation System	3	15-Feb	15-Feb
Submit enrolment projections to the Ministry		15-Feb	14-Feb
French Immersion enrolment adjustments	1	16-Feb	21-Feb
Input regarding Priorities for 2007/2008	5,7	26-Feb	26-Feb
Broad guidelines & concepts for 2007/08	5,7	28-Feb	28-Feb
Local School Calendar options	2,6,9	28-Feb	28-Feb
School Service Plans - Guidelines & Objectives	7	09-Mar	09-Mar
District Departmental Service Plans	5	13-Mar	13-Mar
Broad guidelines & concepts for 2007/08	5,7	13-Mar	13-Mar
SD48 Funding Allocation System	3	13-Mar	13-Mar
School Service Plans - Guidelines & Objectives	7	13-Mar	13-Mar
Budget Development Process		14-Mar	14-Mar
Reaffirm or revise class size guidelines	8,9	14-Mar	
District Departmental Service Plans	5	15-Mar	15-Mar by Email
District Funding for 2007/08 Announced		15-Mar	15-Mar
Cross boundary student transfers confirmed	1	15-Mar	16-Mar
Elementary Class Configurations	1	16-Mar	16-Mar
Proposed Budget Allocations	6,8	27-Mar	27-Mar
Proposed Budget Allocations	6,8	28-Mar	28, 29 Mar
Proposed Budget Allocations	6,8	29-Mar	02-Apr
School Budget Funding Allocations	8,9	30-Mar	03-Apr
District Service Plans and Budget Allocations	5,6,7,8	04-Apr	10-Apr
List of continuing teachers and support staff	10	05-Apr	05-Apr

Role of Group				
Board	Finance Committee	District Management	Principal	Education Partner Groups
	Review / Discuss Options	Review / Discuss Options		
		Collate/review for reasonableness	Submit to District Office	
	Review for General Implications	Provide 3 year enrolment projections		
Receive Report		Provide Status Report		
		Review / Discuss Options	Review / Discuss Options	
		District staff submit		
		Adjust school enrolments to reflect French Immersion	Immersion Schools provide enrolments and list of grade 5 showing home schools	
Review/Discuss presentations				Presentations to Board
Set education guidelines after considering presentations by Education Partners		Advise all stakeholders of education guidelines and request feedback	Review education guidelines and provide feedback by March 12	Review education guidelines and provide feedback by March 12
Review & discuss options and implications		Review options and identify considerations	Provide local calendar options and preferences for consideration	
		Provide Template for School Service Plan	Develop and submit School Service Plans Guidelines & Objectives	Prior consultation with SPC
	Review District Service Plans	Presentation & Review of Departmental Submissions		
	Review Education Partners' Feedback on Broad Guidelines	Collate Education Partners' Feedback on Broad Guidelines		
	Determine System	Determine System		
	Review School Service Plans	Summarize, Present & Review		
Receive Report		Provide Status Report		
Board to review / confirm		Recommendation to Board		
		Presentation & Review of Departmental Submissions	Review and provide feedback	
		Adjust enrolment projections	Approve/deny applications and report enrolment changes	
		District staff to review and verify class size compliance	Submit Class Configurations	
		Review / Discuss Allocations		
	Review / Discuss Allocations	Presentation of Allocations		
		Presentation of Allocations	Review and provide feedback	
		Distribute to Schools	Develop School Budget and submit to District by April 13	Consultation with SPC
		Present Departmental Service Plans and Budget Allocations		Attend presentation, report back to members, consider service plans and provide feedback to District Administration by April 13
		Distribute to Principals	Review / Reconcile	

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Role of Group				
Board	Finance Committee	District Management	Principal	Education Partner Groups

Surplus Estimates	6,9	11-Apr	
Budget Development Process		11-Apr	11-Apr
Proposed Local School Calendars for 2007/08	2,6,9	11-Apr	11-Apr
Service Plans and Budget Allocations	7,9	March 31 – April 13	13-Apr
School Service Plans and Budget Spending Allocations	7,9	13-Apr	13-Apr
07/08 Teacher staffing plans	10	13-Apr	
Draft Budget Allocations - combined District & Schools	10	18-Apr	18-Apr
Adjust District Service Plans & recalculate funding allocations to Schools - P2 Budget	10		19-Apr
Submit revised School P2 Budgets	10	27-Apr	27-Apr
Last date for notice of teacher transfer or layoff	10	30-Apr	n/a
Draft Budget Allocations - combined District & Schools	10	02-May	02-May
Budget Development Process		09-May	02-May
Teachers transfers approved	10	09-May	n/a
200720/08 Budget Bylaw		09-May	09-May
List of support staff reductions	10	14-May	14-May
Approve Local School Calendars	2	30-May	31-May
Layoff notices to support staff (if applicable)	10	May/June	May/June
Budget Development Process		13-Jun	13-Jun
200720/08 Budget Bylaw		13-Jun	13-Jun
2006/2007 Surplus	11,12	22-Aug	23-Aug
2006/2007 Surplus	11,12	27-Aug	03-Oct
2006/2007 Surplus	11,12	29-Aug	03-Oct
Actual enrolment data	12,14	Sept 4-7	07-Sep
Elementary Class Configurations	12,14	05-Sep	10-Sep
Secondary enrolment data	12,14	10-Sep	10-Sep

	Review / Discuss Surpluses	Estimate District surplus for 2006/07 and advise plan for use	Estimate school surplus for 2006/07 and advise plan for use	
Receive Report		Provide Status Report		
Board review		Provide recommendations for 2007/08	Summarize feedback received and forward to District staff	SPC/PAC and school staff to provide feedback to Principal
		Receive feedback and submissions from schools and Partner Groups	Modify School Service Plan and determine School Budget Spending Allocations	SPC & staff input to modify School Service Plan and develop Budget Allocations
		Receive and consolidate	Submit to District Office	
		Human Resources receive, review, reconcile & collate	Principals submit plan and recommended transfers / layoffs	
	Review Service Plans and Budget Allocations	Working session to review the consolidated district and school services budgets		
		Distribute to Schools	Develop School Budget and submit to District by April 27	Consultation with SPC
		Receive and consolidate	Submit to District Office	
	Review Service Plans and Budget Allocations	Review the consolidated district and school services budgets		
Receive Report		Provide Status Report		
Board approval		Recommend to Board		
Board approval - First Reading	Recommendation to Board			
		Human Resources collate & review	Principals/Supervisors submit to Human Resources	
Board approval				
		Distribute notices		
Receive Report		Provide Status Report		
Board approval - Second and Third Reading	Recommendation to Board			
	Review and prepare recommendation for allocation of surplus <u>only for those items which need to be urgently addressed prior to school opening</u>	Present surplus report for 2006/07 and updated pending priorities list		
	Review recommended uses with partner groups			Education partners consider service requests and provide feedback to District Administration
Approve allocation of surplus <u>only for those items which need to be urgently addressed prior to school opening</u>	Make recommendation to the Board regarding amendments to 2007/08 operating budget			
		Review for emergent issues of class size & composition	Principals provide actual enrolments	
		Review and adjust if required	Submit proposed configuration	
		Staffing allocation revised if necessary	Submit actual secondary enrolment data	

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TASK

Role of Group

Item	Action No.	Required	Completed
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Board	Finance Committee	District Management	Principal	Education Partner Groups
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Budget Development Process		12-Sep	
District Departmental Service Plans	14	19-Sep	19-Sep
Recalculated 2007/2008 School Funding Allocation	12,13	24-Sep	n/a
Data counts for funding purposes complete		05-Oct	05-Oct
Budget Development Process		10-Oct	10-Oct
Budget Development Process		14-Nov	
Final Funding for 2007/08 from Ministry of Education		30-Nov	
Final Service Plans and Budget Allocations	14,15,16	05-Dec	
Final Service Plans and Budget Allocations	14,15,16	06-Dec	
Final Service Plans and Budget Allocations	14,15,16	12-Dec	
Budget Development Process		12-Dec	
Final Service Plans and Budget Allocations	15,16	12-Dec	
Recalculated 2007/2008 School Funding Allocation	16	13-Dec	
Final School Spending Allocations	17	21-Dec	
Budget Development Process		16-Jan	
Final 2007/2008 Budget - District and Schools	15,17	16-Jan	
Budget Development Process		13-Feb	
Final 2007/08 Budget Bylaw		13-Feb	

Receive Report		Provide Status Report		
	Review Revised District Service Plans & develop recommendation to Board	Presentation & Review of Revised Departmental Plans		
		Calculate and notify schools		
		Collated at District office and submitted to Ministry	Submit to District office	
Receive Report		Provide Status Report		
Receive Report		Provide Status Report		
	Review Summary of changes and prepare recommendation to Board	Staff provide a summary of proposed changes to District Services for 2007/08		
		Distribute Information and recommendation to Partner Groups		Review information and recommendation and provide feedback by December 11
	Review feedback from partner groups and confirm/amend recommendation	Collate feedback		
Receive Report		Provide Status Report		
Approve Final Allocations				
		Calculate and notify schools		
		Review of final budgets	Principals submit final budget	
Receive Report		Provide Status Report		
	Review / Discuss and prepare recommendation to Board	Provide summaries		
Receive Report		Provide Status Report		
Board approval	Finance Committee Recommendation to Board			

SCHOOL DISTRICT NO. 48 (HOWE SOUND) - 2007/2008 BUDGET DEVELOPMENT TIMELINES

	PREVIOUS SCHOOL YEAR					SCHOOL YEAR - 2007 / 2008												FOLLOWING SCHOOL YEAR						
	2007												2008											
	JAN	FEB	MAR	APR	MAY	JUNE	JULY	AUG	SEPT	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUNE	JULY	AUG	SEPT	OCT	NOV	DEC
OUTPUTS		Pupil Projections Submitted to MEd				Budget Bylaw Passed			Ministry of Ed submissions: - Class Size Data - Student Demographic Data - Teacher Demographic Data - FTE Staffing Levels Data - Accountability Contract				Final Budget Bylaw Passed						Financial Statement Submission					
ACTIONS				A. Develop School Plans		B. Develop Accountability Contract																		
	1. Projecting Pupils & Classes	2. Determining School Calendar	3. Review Funding Allocation System																					
	4. Projecting Unit Costs	5. Build District Service Plans	6. Build District Budget																					
	7. Develop School Service Plans: Guidelines & Objectives	8. School Funding Allocations	9. School Budgets Built																					
		10. Finalize Total District Budget																						
						11. Determine Prior Surplus																		
						12. Revision #1 of School Allocations	13. Revision #1 of School Budgets																	
						14. Revise District Service Plans	15. Revise District Budgets	16. Revision #2 of School Allocations	17. Revision #2 of School Budgets															
																						18. Review & Report: Plans vs. Results		
INPUTS		District / School Priorities Developed MEd Announces Funding					Actual Pupil Demographics Known				MEd Finalizes Funding									Actual Financial Results Known				
	PLANNING						DOING						REVIEWING											