

Budget Development Process 2008/09

TASK				Role of Group				
Item	Action No.	Scheduled	Completed	Board	Finance Committee	District Management	Principal	Education Partner Groups
* Confirm Budget Development Process for 2008/2009		30-Jan			Confirm Process			
* SD48 Funding Allocation System		30-Jan			Review / Discuss Options	Review / Discuss Options	Review / Discuss Options	
* Enrolment projections		11-Feb				Collate/review for reasonableness and general implications	Submit to District Office	
* SD48 Funding Allocation System		13-Feb			Approve Changes	Propose Changes		
* Budget Development Process		13-Feb		Receive Report		Provide Status Report		
* Submit enrolment projections to the Ministry		15-Feb				Provide 3 year enrolment projections		
* School Service Plans & Costs Template		18-Feb				Provide Templates for School Service Plans & Costs		
* French Immersion enrolment adjustments		27-Feb				Adjust school enrolments to reflect French Immersion	Immersion Schools provide enrolments and list showing home schools	
* Input regarding Priorities for 2008/2009		27-Feb		Review/Discuss presentations				Presentations to Board
* Local School Calendar options		27-Feb		Review & discuss options and implications		Review options and identify considerations	Provide local calendar options and preferences for consideration	
* Broad guidelines & concepts for 2008/09		05-Mar		Review Education Partners' Presentations and Confirm Broad Guidelines for 08/09				
* Reaffirm or revise class size guidelines		05-Mar		Board to review / confirm		Recommendation to Board		
* School Service Plans and District Departmental Service Plans Completed		12-Mar				Develop & Submit Departmental Service Plans and Costing of the Plan	Develop & Submit School Service Plans and Costing of the Plans	Prior consultation with SPC
* Elementary Class Configurations		12-Mar				District staff to review and verify class size compliance	Submit Class Configurations	
* Budget Development Process		12-Mar		Receive Report		Provide Status Report		
* District Funding for 2007/08 Announced		15-Mar						
* School Service Plans & Costs		18-Mar				Review	Present	
* District Departmental Service Plans & Costs		19-Mar				Present and Review		
* Review School Service Plans & Costs and District Departmental Service Plans & Costs		26-Mar			Review & Discuss	Review & Discuss		
* 2008/2009 Revenue Allocations		27-Mar			Allocate Revenue to School Service Plans and District Departmental Plans			
* School and District Funding Allocations		28-Mar				Notify Schools and District Departments		
* List of continuing teachers and support staff		04-Apr				Distribute to Principals	Review / Reconcile	
* Surplus Estimates		09-Apr				Estimate District surplus for 2007/08 and provide reasons therefor	Estimate School surplus for 2007/08 and provide reasons therefor	
* Proposed Local School Calendars for 2007/08		09-Apr		Board review		Provide recommendations for 2008/09	Summarize feedback received and forward to District staff	SPC/PAC and school staff to provide feedback to Principal
* Budget Development Process		09-Apr		Receive Report		Provide Status Report		

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Item	Action No.	Scheduled	Completed	Board	Finance Committee	District Management	Principal	Education Partner Groups
* School & District Service Plans and Budget Spending Allocations		11-Apr				Submit District Departmental Service Plans & Budgets	Submit District Departmental Service Plans & Budgets	
* 08/09 Teacher staffing plans		11-Apr				Human Resources receive, review, reconcile & collate	Principals submit plan and recommended transfers / layoffs	
* Review School & District Budgets		16-Apr			Review Adjusted Service Plans & Costs	Working session to review the consolidated district and school services budgets		
* School & District Service Plans and Budget Spending Allocations presented to Education Partners		23-Apr						Attend presentation, report back to members, consider service plans and provide feedback to District Administration
* Last date for notice of teacher transfer or layoff		30-Apr						
* Draft Budget Allocations - combined District & Schools		07-May				Consolidate district and school services budgets		
* Budget Development Process		14-May		Receive Report		Provide Status Report		
* Teachers transfers approved		14-May		Board approval		Recommend to Board		
* 2008/2009 Budget Bylaw		14-May		Board approval - First Reading	Recommendation to Board			
* List of support staff reductions		21-May				Human Resources collate & review	Principals/Supervisors submit to Human Resources	
* Approve Local School Calendars		28-May		Board approval				
* Layoff notices to support staff (if applicable)		May/June				Distribute notices		
* Budget Development Process		11-Jun		Receive Report		Provide Status Report		
* 2008/2009 Budget Bylaw		11-Jun		Board approval - Second and Third Reading	Recommendation to Board			
* 2007/2008 Surplus		20-Aug			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 2007/08		
* 2007/2008 Surplus		25-Aug			Review recommended uses with partner groups			Education partners consider service requests and provide feedback to District Administration
* 2007/2008 Surplus		27-Aug		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			
* School Budgets		27-Aug				Distribute School F1 Budget Spreadsheets		
* Actual enrolment data		Sep 2 - 5				Review for emergent issues of class size & composition	Principals provide actual enrolments	
* Elementary Class Configurations		04-Sep				Review and adjust if required	Submit proposed configuration	
* Secondary enrolment data		12-Sep				Review for emergent issues of class size & composition	Submit actual secondary enrolment data	
* Budget Development Process		10-Sep		Receive Report		Provide Status Report		
* Data counts for funding purposes complete		30-Sep				Collated at District office and submitted to Ministry	Submit to District office	

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TASK			
Item	Action No.	Scheduled	Completed

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

* Revised School & District Departmental Service Plans		01-Oct	
* 2007/2008 Surplus		08-Oct	
* Budget Development Process		08-Oct	
* School Budgets		15-Oct	
* School Budgets		24-Oct	
* Budget Development Process		12-Nov	
* Final Funding for 2007/08 from Ministry of Education		30-Nov	
Final Service Plans and Budget Allocations			
Final Service Plans and Budget Allocations			
Final Service Plans and Budget Allocations			
* Budget Development Process		10-Dec	
* Final Service Plans and Budget Allocations		10-Dec	
Recalculated 2008/2009 School Funding Allocation			
Final School Spending Allocations			
Budget Development Process			
Final 2008/2009 Budget - District and Schools			
Budget Development Process			
Final 2008/09 Budget Bylaw			

	Review Revised School & District Service Plans & develop recommendation to Board	Presentation & Review of Revised Departmental Plans	Presentation & Review of Revised School Service Plans	
Allocate remainder of 2007/2008 Surplus	Recommendation to Board			
Receive Report		Provide Status Report		
		Distribute School F2 Budget Spreadsheets		
			Submit Completed F2 Budget Spreadsheet	
Receive Report		Provide Status Report		
	Review Summary of changes and prepare recommendation to Board	Staff provide a summary of proposed changes to District Services		
		Distribute Information and recommendation to Partner Groups		Review information and recommendation and provide feedback
	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) - 2008/2009 BUDGET DEVELOPMENT TIMELINES

		PLANNING						IMPLEMENTING												REVIEWING					
		PREVIOUS SCHOOL YEAR						SCHOOL YEAR - 2008 / 2009												FOLLOWING SCHOOL YEAR					
		2008						2009																	
		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		Final Budget Bylaw Passed								Financial Statement Submission		
ACTIONS		Develop School Plans			Develop Achievement Contract			Class Size & Composition Reports																	
		Develop Literacy Plan																							
	1. Projecting Pupils & Classes	←→									Student & Teacher Data Collection			Student Data Collection			Student Data Collection								
	2. Determining School Calendar	←→																							
	3. Review Funding Allocation System	←→																							
	4. Projecting Unit Costs	←→																							
	5. Develop District Service Plans & Costs	←→																							
	6. Develop School Service Plans & Costs	←→																							
	7. School & District Funding Allocations	←→																							
	8. School & District Budget Decisions	←→																							
	9. Finalize Total School & District Budgets	←→																							
	10. Determine 07/08 Surpluses							←→																	
	11. Allocate 07/08 Surpluses							←→																	
	12. Revise School & District Service Plans							←→																	
	13. Revision F1 of School & District Budgets							←→																	
	14. Revision F2 of School & District Budgets							←→																	
								REGULAR FINANCIAL REPORTING of ACTUAL RESULTS																	
INPUTS		District / School Priorities Developed MEd Announces Funding						Actual Pupil Demographics Known						MEd Finalizes Funding						Actual Financial Results Known					