

**Budget Development Process 2010/11**

TASK			
Item	Action No.	Scheduled	Completed

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

1	Confirm Budget Development Process for 2010/2011		Wednesday, December 09, 2009	9-Dec-09
2	Budget Development Process		Wednesday, January 13, 2010	13-Jan-10
3	SD48 Funding Allocation System	3	Wednesday, January 27, 2010	27-Jan-10
4	SD48 Funding Allocation System	3	Wednesday, February 03, 2010	3-Feb-10
5	Budget Development Process		Wednesday, February 03, 2010	3-Feb-10
6	Enrolment projections	1	Monday, February 08, 2010	8-Feb-10
7	French Immersion enrolment adjustments	1	Friday, February 12, 2010	9-Feb-10
8	Submit enrolment projections to the Ministry	1	Monday, February 15, 2010	12-Feb-10
9	School and District Departmental Budget Spreadsheets	6	Friday, February 26, 2010	2-Mar-10
10	Review Table of Specifications	5,6	Wednesday, March 03, 2010	3-Mar-10
11	Review & Discuss Budget Assumptions & Guidelines	5,6	Wednesday, March 03, 2010	3-Mar-10
12	Input regarding Priorities for 2010/2011	5,6	Wednesday, March 03, 2010	3-Mar-10
13	Broad guidelines & concepts for 2010/11	5,6	Wednesday, March 10, 2010	10-Mar-10
14	Review & Discuss Budget Development Progress	5,6	Wednesday, March 10, 2010	10-Mar-10
15	Elementary Class Configurations	6	Wednesday, March 10, 2010	17-Mar-10
16	District Departmental Budget Spreadsheets Completed	5	Wednesday, March 10, 2010	17-Mar-10
17	School Budget Spreadsheets Completed	6	Wednesday, March 10, 2010	17-Mar-10
18	Budget Development Process		Wednesday, March 10, 2010	10-Mar-10
19	District Funding Allocations for 2010/11 Announced by Ministry	7	Monday, March 15, 2010	15-Mar-10
20	Review School and District Departmental Budget Submissions and compare with funding available	5,6	March 17, 18, 2010	17-Mar-10
21	2010/2011 Revenue Allocations for P2	7	Wednesday, April 14, 2010	14-Apr-10
22	Budget Development Process		Wednesday, April 14, 2010	14-Apr-10
23	List of continuing teachers and support staff	8	Thursday, April 15, 2010	16-Apr-10
24	Surplus Estimates	8	Friday, April 16, 2010	16-Apr-10
25	10/11 Teacher staffing plans	8	Tuesday, April 20, 2010	20-Apr-10
26	School & District Departmental P2 Budget Spreadsheets Completed	5,6	Tuesday, April 20, 2010	20-Apr-10

	Confirm Process			
	Receive Report	Provide Status Report		
	Review / Discuss Options	Review / Discuss Options	Review / Discuss Options	
	Approve Changes	Propose Changes		
	Receive Report	Provide Status Report		
		Collate/review for reasonableness and general implications	Submit to District Office	
		Adjust school enrolments to reflect French Immersion	Immersion Schools provide enrolments and list showing home schools	
		Provide 3 year enrolment projections		
	Board to review / confirm	Provide Spreadsheets for School & District Budgets		
		Recommendation to Board		
	Review & Discuss Budget Assumptions & Guidelines			
	Review/Discuss presentations			Presentations to Board 4:00 pm
	Review Education Partners' Presentations and Confirm Broad Guidelines for 10/11			
	Review & Discuss Budget Development Progress			
		District staff to review and verify class size compliance	Submit Class Configurations	
		Submit Departmental Budget Spreadsheets and describe what service levels they represent		
			Submit School Budget Spreadsheets and describe what service levels they represent	
	Receive Report	Provide Status Report		
	Review, Discuss and Determine allocation of funding to schools & departments	Present, Review & Discuss Budget Submissions	Present, Review & Discuss Budget Submissions	
	Review Budget Status & Determine process to balance	Notify Schools and District Departments		
	Receive Report	Provide Status Report		
		Distribute to Principals	Review / Reconcile	
		Estimate District surplus for 2009/10 and provide reasons therefor	Estimate School surplus for 2009/10 and provide reasons therefor	
		Human Resources receive, review, reconcile & collate	Principals submit plan and recommended transfers / layoffs	
		Submit Departmental Budget Spreadsheets and describe what service levels they represent	Submit School Budget Spreadsheets and describe what service levels they represent	

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27	Review School & District Budgets	8	Wednesday, April 21, 2010	21-Apr-10
28	Last date for notice of teacher transfer or layoff	9	Tuesday, April 27, 2010	Nil
29	School & District Service Plans and Budget Spending Allocations presented to Education Partners	8	Wednesday, April 28, 2010	28-Apr-10
30	Proposals for spending estimated Targeted Aboriginal Education Funds	9	Wednesday, May 12, 2010	12-May-10
31	Draft Budget Allocations - combined District & Schools	9	Wednesday, May 12, 2010	12-May-10
32	Budget Development Process		Wednesday, May 12, 2010	12-May-10
33	Teachers transfers approved	9	Wednesday, May 12, 2010	N/A
34	2010/2011 Budget Bylaw		Wednesday, May 12, 2010	12-May-10
35	List of support staff reductions	9	Wednesday, May 19, 2010	19-May-10
36	Approve any amendments to Local School Calendars for 2010/11	2	Wednesday, May 26, 2010	26-May-10
37	Layoff notices to support staff (if applicable)	9	May, June 2010	19-May-10
38	Budget Development Process		Wednesday, June 09, 2010	9-Jun-10
39	2010/2011 Budget Bylaw	9	Wednesday, June 09, 2010	9-Jun-10
40	2009/2010 Surplus	10	Monday, August 30, 2010	1-Sep-10 No Surplus Allocated
41	2009/2010 Surplus	10	Tuesday, August 31, 2010	N/A
42	2009/2010 Surplus	11	Wednesday, September 01, 2010	1-Sep-10 No Surplus Allocated
43	School Budgets	13	Thursday, September 02, 2010	2-Sep-10
44	Actual enrolment data	12	September 7 to 17, 2010	September 7 to 20, 2010
45	Elementary Class Configurations	12	Wednesday, September 08, 2010	8-Sep-10
46	Secondary enrolment data	12	Monday, September 13, 2010	14-Sep-10
47	Budget Development Process		Wednesday, September 15, 2010	15-Sep-10
48	Data counts for funding purposes complete		Thursday, September 30, 2010	
49	Proposals for spending finalized Targeted Aboriginal Education Funds	12	Wednesday, October 13, 2010	
50	Revised School & District Departmental Service Plans	12	Wednesday, October 13, 2010	
51	2009/2010 Surplus	11	Wednesday, October 13, 2010	

		Review Adjusted Service Plans & Costs	Working session to review the consolidated district and school services budgets		
					Attend presentation, report back to members, consider service plans and provide feedback to District Administration
	Review Recommendations	Review Recommendations		District Administrator - Aboriginal Education provides Recommendations	After Consultation with First Nations Targeted Funding Representatives
			Consolidate district and school services budgets		
	Receive Report		Provide Status Report		
	Board approval		Recommend to Board		
	Board approval - First & Second 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 - 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 2009/10		
		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			
			Distribute School F1 Budget Spreadsheets		
			Review for emergent issues of class size & composition	Principals provide actual enrolments	
			Review and adjust if required	Submit proposed configuration	
			Review for emergent issues of class size & composition	Submit actual secondary enrolment data	
	Receive Report		Provide Status Report		
			Collated at District office and submitted to Ministry	Submit to District office	
	Review Recommendations	Review Recommendations		District Administrator - Aboriginal Education provides Recommendations	After Consultation with First Nations Targeted Funding Representatives
		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 2009/2010 Surplus	Recommendation to Board			

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52	Budget Development Process		Wednesday, October 13, 2010	
53	School Budgets	14	Wednesday, October 20, 2010	
54	School Budgets	14	Wednesday, October 27, 2010	
55	Budget Development Process		Wednesday, November 10, 2010	
56	Final Funding for 2010/11 from Ministry of Education		December, 2010	
57	Final Service Plans and Budget Allocations	14		
58	Final Service Plans and Budget Allocations	14		
59	Final Service Plans and Budget Allocations	14		
60	Budget Development Process		Wednesday, December 08, 2010	
61	Final Service Plans and Budget Allocations			
62	Recalculated 2010/2011 School Funding Allocation			
63	Final School Spending Allocations			
64	Budget Development Process		Wednesday, January 12, 2011	
65	Final 2010/2011 Budget - District and Schools			
66	Budget Development Process		Wednesday, February 09, 2011	
67	Final 2010/11 Budget Bylaw		Wednesday, February 09, 2011	

	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		

**Education Partner Groups \*** Representatives from: SSTA, SSPVPA, CUPE, DPAC, First Nations