

Budget Development Process 2006/07

| Date Completed | TASK | Date Required | Board Role | Finance Committee Role | District Management Role | Principals' Role | Education Partners (CUPE, DPAC, HSTA, HSPVPA) or SPC at school level |
|--|---|----------------------|---|---|---|---|---|
| | Ministry of Education announces education funding for 2006/07 | February 1 | | | | | |
| Feb 8 | Enrolment projections | February 8 | | | Collate/review for reasonableness and send to Ministry of Education (Note: consider closure of Woodfibre) | Submit enrolment projections for 2006/07, 2007/08 and 2008/09 to District Office | |
| Feb 14 | Submit enrolment projections to the Ministry of Education | February 14 | | | District staff submit | | |
| Feb 15 | Review of 3 year enrolment projections and general budget implications | February 15 | | Finance Committee to review | Provide 3 year enrolment projections | Provide enrolment projections for 3 years for school | |
| | Presentation from DPAC, HSPVPA, HSTA and CUPE – priorities for 2006/07 | February 15 | Presentation to Board for consideration | | | | |
| Feb 20 | French Immersion enrolment adjustments | February 20 | | | Adjust school enrolments to reflect French Immersion enrolment and advise all elementary principals | Mamquam and Spring Creek Principals to provide a list of grade 5 enrolment showing home schools | |
| Done with Board & Sr. Staff only for 2006/07 | Board review presentations from DPAC, HSPVPA, HSTA and CUPE and discuss general concepts/consideration to serve as education guidelines which will be considered when the 2006/07 budget is developed | February 22 | Set broad guidelines/concepts | | Advise all stakeholders of concepts/consideration to serve as education guidelines which will be considered by Board when 2006/07 budget developed – request feedback | | |
| Feb 28 | Advise Principals, HSTA, CUPE, DPAC of concepts/consideration to serve as education guidelines which will be considered by the Board in the 2006/07 budget process. | February 27 | | | Communicate to education partners | Review concepts/consideration to serve as education guidelines and provide feedback | Education partners review concepts/consideration to serve as education guidelines and provide feedback |
| | Local School Calendar options reviewed by Finance Committee | March 1 | | Finance Committee review and provide feedback re financial considerations | Review options and identify financial considerations | Provide local calendar options for consideration | |
| Mar 8 | Reaffirm or revise class size guidelines | March 8 | Board to review | | Recommendation to Board | | |
| Mar 15 | Ministry of Education to advise Boards of specific funding for our School District for 2006/07 | March 10 | | | | | |
| By Mar 10 | District Administration (by Dept.) develop service plan and accompanying budget (template overview provided– plus detail available, including staff position/FTE/location, equipment, consumables) | March 10 | | | Develop District Service Plan | | |

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| By Mar 10 | Present service plans for departments to Supervisor (depending on department) Rick Erickson – Lawrence, Barb, Pius, Alex, Mike Nancy Edwards– Lee, Scott, John, Rick | March 10 | | | Review/approval by Superintendent or Secretary-Treasurer as appropriate | | |
| Mar 10 | Elementary Principals to submit proposed class configurations for 2006/07 | March 10 | | | District staff to review and verify class size compliance | Elementary Principals to submit class configurations | |
| | Cross boundary transfers confirmed and resulting changes in enrolment projections established | March 15 | | | Adjust enrolment projections for schools for 2006/07 | Schools to approve/deny cross boundary applications and advise District staff of enrolment changes | |
| Mar 20 | District Service Plans and Budgets presented to District Management for information/feedback (no decision making role) | March 20 | | | Review Budget status | | |
| Mar 21 | Each District Administrator presents their department service plan & budget to Finance Committee | March 21 9 am to 4 pm | | Approve/Revise | Each District Administrator presents their service plan and budget | | |
| Mar 27 | Each District Administrator presents department service plan & budget to Principals | March 23 4:00 pm | | | Each District Administrator presents their service plan and budget | Review Plan and provide feedback | |
| | District Administration present District Service Plan to 2 representatives from each of HSTA, CUPE, DPAC, HSPVPA– feedback to District Administration by April 13 | March 28 | | | District Management present draft service plan for their department | | Education partners attend presentation, report back to members, consider service plan and provide feedback to District Administration |
| Mar 31 | School P1 Budget Allocations are distributed | March 29 | | | | | |
| | Principals/District staff to estimate surplus for 2005/06 and intended use | March 31 | | | Determine projected surplus for 2005/06 | Provide estimated school surplus for 2005/06 and advice of plan for use (specifically whether or not this will be applied to 2006/07 budget) | |
| Apr 6 | List of continuing teachers and support staff to Principals | April 7 | | | District staff | | |
| May 31 | Local School Calendars for 2006/07 approved | April 12 | Board approval | | Provide recommendation regarding local school calendars for 2006/07 | Summarize feedback received from parents and staff and forward to District staff | SPC/PAC and school staff to provide feedback to Principal |
| Apr 13 | Schools develop School Service Plan and allocate resources and submit to Secretary-Treasurer | March 31 – April 13 | | | Receive feedback | Principals/SPC develop School Service Plan and Budget, Review District Service Plan | Principals/SPC develop School Service Plan and Budget |

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| Apr 13 | Schools submit their Service Plans and Budget (to Secretary-Treasurer) | April 13 | | | District staff collate school budgets | Principals develop budget through consultation with SPC and staff | Principals develop budget through consultation with SPC and staff |
| Apr 13 | Teacher staffing plan for each school submitted to Director of Human Resources | April 13 | | | | Principals submit plan | |
| Apr 13 | List of recommended teachers transfers (or layoff if necessary) | April 13 | | | | Principals provide recommendation | |
| April 19 | Review of draft of District budget | April 19 | | Review the draft district services plan and plans received from the schools | Working session to review the consolidated district and school services budget | | |
| June 8 | Review of District Services Plan and budget and schools plans and budgets with representatives from DPAC, HSTA, CUPE, HSPVPA (2 representatives from each group) – feedback to District Administration | April 24 | | Review feedback received from partner groups. | Review of proposed school district plans and budget for 2006/07 | | Education partners attend presentation, report back to members, consider service plan and provide feedback to District Administration |
| June 14 | Rick Erickson and Nancy Edwards provide recommendation to the Finance Committee to either approve or revise the School Service Plans and District Service Plan | April 26 | | Finance Committee to approve/revise | Rick Erickson & Nancy Edwards to provide recommendation including secondary staff pre-loading | | |
| No layoffs | Last date for notice of teacher transfer or layoff | April 28 | | | District Management | | |
| No transfers | Teachers transfers approved | May 10 | Board approval | | Recommend to Board | | |
| June 14 | Budget bylaw to the Board for 1 st reading | May 10 | Board approval | Finance Committee Recommendation to Board | | | |
| June 1 | List of support staff reductions | May 16 | | | | Principals/Supervisors | |
| June 1 | Layoff notices to support staff (if applicable) | May/June | | | Distribute notices | | |
| June 14 | Budget bylaw for 2006/07 | June 14 | Board approval | Finance Committee to provide a recommendation to the Board for approval | | | |
| | Review actual 2005/06 surplus in conjunction with Pending priorities list and other budget considerations which have arisen since development of the pending priorities list | August 16 | | 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 for 2005/06, pending priorities list and identify other issues to be considered | | |
| | Review recommended allocation of 2005/06 surplus with partner group representatives | August 21 | | Review with partner groups | | | Education partners consider service requests and provide feedback to District Administration |

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| | Consider and approve recommendation from Finance Committee for allocation of all (or part) or 2005/06 actual surplus (only items which need to be urgently addressed prior to school start up) | August 28 | Board approval of allocation of all or part of actual 2005/05 surplus | Make recommendation to the Board regarding amendments to 2006/07 operating budget | | | |
| | Actual enrolment data collected from schools | Sept 5-8 | | | | Principals provide actual enrolments | |
| | Proposed class configurations for elementary schools submitted | September 6 | | | Review and adjust if required | Submit proposed configuration | |
| | Secondary enrolment numbers submitted | September 12 | | | Staffing allocation revised if necessary | Principals to submit actual secondary enrolment numbers | |
| | Review of District Services for 2006/07, pending priorities and issues identified after development of pending priority list and/or related to actual student numbers and demographics for 2006/07 | September 13 | | Finance Committee reviews any proposed changes to District Services | Staff provide a summary of proposed changes to District Services for 2006/07 | | |
| | F1 Funding Allocation for 2006/07 to Schools | September 26 | | | Calculate F1 and notify schools | | |
| | Approve District Services for 2006/07, pending priorities and issues identified after development of pending priority list and/or related to actual student numbers and demographics for 2006/07 | September 27 | Board approval | Finance Committee provides Summary of changes and recommendations to Board | | | |
| | Data counts for funding purposes complete | October 6 | | | Collated at District office | Submit to District office | |
| | Final Funding for 2006/07 from Ministry of Education | November 30 | | | | | |
| | Final funding to schools for 2006/07 based on final 1701 counts | December 8 | | | District Management advises schools | | |
| | Schools to submit final 2006/07 budgets | December 15 | | | Review of final budgets | Principals submit final budget | |
| | Proposed final District budget (District and School) budgets reviewed | January | | Finance Committee | Staff to provide summary and recommendation | | |
| | Board approval of final budget | February | Board approval | Finance Committee Recommendation to Board | | | |