

**Budget Development Process 2009/10**

<b>TASK</b>			
<b>Item</b>	<b>Action No.</b>	<b>Scheduled</b>	<b>Completed</b>
Confirm Budget Development Process for 2009/2010		Wednesday, November 12, 2008	
<b>Budget Development Process</b>		<b>Wednesday, January 14, 2009</b>	
SD48 Funding Allocation System	3	Wednesday, January 28, 2009	
Enrolment projections	1	Monday, February 09, 2009	
SD48 Funding Allocation System	3	Wednesday, February 11, 2009	
<b>Budget Development Process</b>		<b>Wednesday, February 11, 2009</b>	
Submit enrolment projections to the Ministry	1	Friday, February 13, 2009	
School and District Service Plans & Costs Template	6	Monday, February 16, 2009	
French Immersion enrolment adjustments	1	Wednesday, February 25, 2009	
Input regarding Priorities for 2009/2010	5,6	Wednesday, February 25, 2009	
Broad guidelines & concepts for 2009/10	5,6	Wednesday, March 04, 2009	
Reaffirm or revise class size guidelines	5,6	Wednesday, March 04, 2009	
District Departmental Service Plans Completed	5	Tuesday, March 10, 2009	
School Service Plans Completed	6	Wednesday, March 11, 2009	
Elementary Class Configurations	6	Wednesday, March 11, 2009	
<b>Budget Development Process</b>		<b>Wednesday, March 11, 2009</b>	
District Funding for 2009/10 Announced	7	Friday, March 13, 2009	
Review School Service Plans & Costs and District Departmental Service Plans & Costs	5,6	March 24, 25, 2009	
2009/2010 Revenue Allocations	7	Thursday, March 26, 2009	
School and District Funding Allocations	7	Friday, March 27, 2009	
List of continuing teachers and support staff	8	Friday, April 03, 2009	
Surplus Estimates	8	Wednesday, April 08, 2009	
<b>Budget Development Process</b>		<b>Wednesday, April 08, 2009</b>	
School & District Service Plans and Budget Spending Allocations	8	Monday, April 20, 2009	
09/10 Teacher staffing plans	8	Monday, April 20, 2009	
Review School & District Budgets	8	Wednesday, April 29, 2009	

<b>Role of Group</b>				
<b>Board</b>	<b>Finance Committee</b>	<b>District Management</b>	<b>Principal</b>	<b>Education Partner Groups</b>
	Confirm Process			
Receive Report		Provide Status Report		
	Review / Discuss Options	Review / Discuss Options	Review / Discuss Options	
		Collate/review for reasonableness and general implications	Submit to District Office	
	Approve Changes	Propose Changes		
Receive Report		Provide Status Report		
		Provide 3 year enrolment projections		
		Provide Templates for School & District Service Plans & Costs		
		Adjust school enrolments to reflect French Immersion	Immersion Schools provide enrolments and list showing home schools	
Review/Discuss presentations				Presentations to Board
Review Education Partners' Presentations and Confirm Broad Guidelines for 09/10				
Board to review / confirm		Recommendation to Board		
		Develop & Submit Departmental Service Plans and Costing of the Plan		
			Develop & Submit School Service Plans and Costing of the Plans	Prior consultation with SPC
		District staff to review and verify class size compliance	Submit Class Configurations	
Receive Report		Provide Status Report		
	Review & Discuss	Present Service Plans and budgets to Finance committee	Present Service Plans and budgets to Finance Committee	
	Allocate Revenue to School Service Plans and District Departmental Service Plans			
		Notify Schools and District Departments		
		Distribute to Principals	Review / Reconcile	
		Estimate District surplus for 2008/09 and provide reasons therefor	Estimate School surplus for 2008/09 and provide reasons therefor	
Receive Report		Provide Status Report		
		Submit District Departmental Service Plans & Budgets	Submit District Departmental Service Plans & Budgets	
		Human Resources receive, review, reconcile & collate	Principals submit plan and recommended transfers / layoffs	
	Review Adjusted Service Plans & Costs	Working session to review the consolidated district and school services budgets		

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

Last date for notice of teacher transfer or layoff	9	Thursday, April 30, 2009	
School & District Service Plans and Budget Spending Allocations presented to Education Partners	8	Wednesday, May 06, 2009	
Draft Budget Allocations - combined District & Schools	9	Wednesday, May 13, 2009	
Budget Development Process		Wednesday, May 13, 2009	
Teachers transfers approved	9	Wednesday, May 13, 2009	
2009/2010 Budget Bylaw		Wednesday, May 13, 2009	
List of support staff reductions	9	Wednesday, May 20, 2009	
Approve any amendments to Local School Calendars for 2009/10	2	Wednesday, May 27, 2009	
Layoff notices to support staff (if applicable)	9	May, June 2009	
Budget Development Process		Wednesday, June 10, 2009	
2009/2010 Budget Bylaw	9	Wednesday, June 10, 2009	
2008/2009 Surplus	10	Monday, August 24, 2009	
2008/2009 Surplus	10	Tuesday, August 25, 2009	
2008/2009 Surplus	11	Wednesday, August 26, 2009	
School Budgets	13	Thursday, August 27, 2009	
Actual enrolment data	12	August 31 to September 11, 2009	
Elementary Class Configurations	12	Wednesday, September 09, 2009	
Secondary enrolment data	12	Monday, September 14, 2009	
Budget Development Process		Wednesday, September 16, 2009	
Data counts for funding purposes complete		Wednesday, September 30, 2009	
Revised School & District Departmental Service Plans	12	Wednesday, October 07, 2009	
2008/2009 Surplus	11	Wednesday, October 14, 2009	
Budget Development Process		Wednesday, October 14, 2009	
School Budgets	14	Wednesday, October 21, 2009	
School Budgets	14	Monday, October 26, 2009	
Budget Development Process		Wednesday, November 18, 2009	

				Attend presentation, report back to members, consider service plans and provide feedback to District Administration
		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 2008/09		
	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 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 2008/2009 Surplus	Recommendation to Board			
Receive Report		Provide Status Report		
		Distribute School F2 Budget Spreadsheets		
			Submit Completed F2 Budget Spreadsheet	
Receive Report		Provide Status Report		

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

Final Funding for 2009/10 from Ministry of Education		Monday, November 30, 2009	
Final Service Plans and Budget Allocations	14		
Final Service Plans and Budget Allocations	14		
Final Service Plans and Budget Allocations	14		
Budget Development Process		Wednesday, December 09, 2009	
Final Service Plans and Budget Allocations		Wednesday, December 09, 2009	
Recalculated 2009/2010 School Funding Allocation		Thursday, December 10, 2009	
Final School Spending Allocations			
Budget Development Process			
Final 2009/2010 Budget - District and Schools			
Budget Development Process			
Final 2009/10 Budget Bylaw			

	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			