



---

## **BUDGET PROCESS & CALENDAR**

### **POLICY ISSUE/SITUATION**

The Superintendent's recommendation for the District's Budget Process & Calendar for 2015-16 is presented for School Board review.

### **RECOMMENDATION:**

It is recommended the Beaverton School District Board of Directors review the proposed Budget Process and Calendar for 2015-16.

**District Goal:** All students will show continuous progress toward their personal learning goals, developed in collaboration with teachers and parents, and will be prepared for post-secondary education and career success.

The Beaverton School District recognizes the diversity and worth of all individuals and groups. It is the policy of the Beaverton School District that there will be no discrimination or harassment of individuals or groups based on race, color, religion, gender, sexual orientation, gender identity, gender expression, national origin, marital status, age, veterans' status, genetic information or disability in any educational programs, activities or employment.

## **2015-16 Budget Process**

### **Phase 1: August and September**

- A. The process to appoint vacant Budget Committee positions will be determined at the August Business Meeting and will be advertised across the District.

### **Phase 2: October, November and December**

- A. In October, the School Board establishes a budget process and sets financial goals for the District. Superintendent Jeff Rose and Budget Officer Claire Hertz will recommend a series of steps to be included in the budget process throughout the 2014-15 school year. The Board will discuss, give suggestions and reach consensus on the process and calendar during the October Workshop and approve at the October Business Meeting. The Board will hold a workshop to discuss financials goals in December and invite Budget Committee members to attend. The Board will approve the goals at the December Board Meeting.
- B. The District will publicize the Budget Process with the internal and external community.
- C. Individual Board members will review the process with continuing Budget Committee members. Budget Officer Claire Hertz will provide orientation to new Budget Committee members.
- D. Achievement Compact Advisory Committee meets to review student data, measure progress on District goals and targets in the Achievement Compact and recommend goals and targets for the following fiscal year.
- E. State of Oregon Economic Forecast will be released in late November. Governor's budget will be released by December 1.
- F. Principals meet to review student data, Achievement Compact Advisory Committee draft recommendations and provide input to the budget process.
- G. Budget Officer Claire Hertz will develop initial estimated resources and budget capacity for the District.

*During the steps from January, February and March, the Budget Committee will be invited to attend all public meetings to listen and participate with community members. Documents and updates will be sent to them as well.*

### **Phase 3: January, February and March**

- A. An internal Budget Team is created (Elementary, Middle, & High school principals, BEA/Teacher Representative, OSEA Representative, District administrators). The Internal Budget Team will serve as a source of information for the Budget Committee.
- B. The Internal Budget Team will build a comprehensive budget corresponding to the Strategic Plan, student growth targets, state compact, School Board policies and priorities and input from principals,

Teaching and Learning, community and listening sessions. This process will begin with the current staffing and service levels, and allocations will be modified to balance to the projected funding levels for 2015-16. The team will build a budget based on what is required under law and policy, the District Strategic Plan, what is known as educators, and other considerations corresponding to data received from the Board and community. The Internal Budget Team will prepare multiple scenarios to respond to the change in funding levels throughout the Oregon Legislative Session.

- C. Superintendent will hold a Listening and Learning Sessions in January with a brief presentation to inform the public about the budget process. There will be an opportunity for Budget Committee members to meet one another and give input to the Internal Budget Team as they are creating the proposed budget. It will provide the public with an opportunity for dialogue and to learn about the resources available.
- D. Three Regional Budget Listening and Learning Sessions will be scheduled in February and March to inform of initial funding levels/budget capacity and to gather input from the community. The meetings will be scheduled in schools in the northern, central and southern regions of the District. One session will be conducted in Spanish with English translation. Board and Budget Committee members will attend their regional session. Staff members will present information and record input to be shared with all members of the Budget Committee.
- E. Staffing allocations will be distributed in mid to late February.

#### **Phase 4: April, May and June**

- A. First Budget Committee Meeting is held. Meeting materials will be shared with the Budget Committee before the meeting, and materials will be made available to news media and the community on the evening of the first Budget Committee meeting. The Budget Committee receives the budget message and reviews figures and accuracy of the proposed budget. The Internal Budget Team will communicate the comprehensive view of changes to the budget. Public testimony will be taken. The Budget Committee asks questions and requests additional information to be provided at the next scheduled meeting. Questions and answers will be posted on the District website for the Budget Committee and community to access.
- B. In the second Budget Committee meeting, the Committee will invite and listen to public testimony. The District will collect questions and queries from previous meetings and present answers and information to the Committee. The Budget Committee will discuss budget and information presented.
- C. In the final meeting, the Budget Committee will make any changes to the proposed budget at the appropriation level by motion and vote. The Budget Committee will approve the budget and tax levies by resolution and vote.
- D. The State of Oregon will release an updated Economic Forecast in May.
- E. A budget summary and Notice of Budget Hearing will be advertised in the local newspaper. The School Board will hold a budget hearing, adopt the budget, and make appropriations and approve tax rates.
- F. Adjustments will be made to staffing as needed due to changes from the proposed to adopted budget

---

**BEAVERTON SCHOOL DISTRICT  
2015 – 2016 DISTRICT BUDGET CALENDAR**

<b>August 25, 2014</b>	<b><i>School Board Meeting 6:30 pm</i></b> Budget Committee openings and application process discussion <i>Location: Administration Center</i>
<b>October 15, 2014</b>	<b><i>School Board Workshop 9:00 am</i></b> Budget Process and Calendar discussion
<b>October 27, 2014</b>	<b><i>School Board Meeting 6:30 pm</i></b> Approve Budget Process and Calendar Appoint Budget Committee Members to fill vacancies <i>Location: Administration Center</i>
<b>December TBD, 2014</b>	<b><i>School Board Workshop 6:30 pm</i></b> Discuss Long Term Financial Goals, invite Budget Committee to attend <i>Location: Administration Center</i>
<b>December 15, 2014</b>	<b><i>School Board Meeting 6:30 pm</i></b> Approve Financial Goals <i>Location: Administration Center</i>
<b>January 20, 2015</b>	<b><i>Superintendent Budget Listening &amp; Learning Session 6:30 pm</i></b> <i>Location: Administration Center</i>
<b>February &amp; March, 2015</b>	<b><i>Three Regional Budget Listening &amp; Learning Session 6:30 pm</i></b> Two sessions in English and one session in Spanish <i>Location: Schools in the northern, central and southern regions of District</i>
<b>April 6, 2015</b>	<b><i>Budget Committee Meeting 6:30 pm</i></b> Elect Budget Committee Officers, propose budget, deliver budget message, receive public testimony and receive Internal Budget Team presentation <i>Location: Aloha High School Commons</i>
<b>April 20, 2015</b>	<b><i>Budget Committee Meeting 6:30 pm</i></b> District presents information in response to questions and queries, Public Testimony, and Budget Committee discussion <i>Location: Administration Center</i>
<b>May 4, 2015</b>	<b><i>Budget Committee Meeting 6:30 pm</i></b> Budget Committee discussion, no Public Testimony, Approval of Budget and Tax Levies <i>Location: Administration Center</i>
<b>June 1, 2015</b>	<b><i>School Board Meeting 6:15 pm</i></b> Budget Public Hearing, Board Adopts Budget and Tax Levies <i>Location: Administration Center</i>

## **2015-16 Budget Process**

### **Phase 1: August and September**

- A. The process to appoint vacant Budget Committee positions will be determined at the August Business Meeting and will be advertised across the District.

### **Phase 2: October, November and December**

- A. In October, the School Board establishes a budget process and sets financial goals for the District. Superintendent Jeff Rose and Budget Officer Claire Hertz will recommend a series of steps to be included in the budget process throughout the 2014-15 school year. The Board will discuss, give suggestions and reach consensus on the process and calendar during the October Workshop and approve at the October Business Meeting. The Board will hold a workshop to discuss financials goals in December and invite Budget Committee members to attend. The Board will approve the goals at the December Board Meeting.
- B. The District will publicize the Budget Process with the internal and external community.
- C. Individual Board members will review the process with continuing Budget Committee members. Budget Officer Claire Hertz will provide orientation to new Budget Committee members.
- D. Achievement Compact Advisory Committee meets to review student data, measure progress on District goals and targets in the Achievement Compact and recommend goals and targets for the following fiscal year.
- E. State of Oregon Economic Forecast will be released in late November. Governor's budget will be released by December 1.
- F. Principals meet to review student data, Achievement Compact Advisory Committee draft recommendations and provide input to the budget process.
- G. Budget Officer Claire Hertz will develop initial estimated resources and budget capacity for the District.

*During the steps from January, February and March, the Budget Committee will be invited to attend all public meetings to listen and participate with community members. Documents and updates will be sent to them as well.*

### **Phase 3: January, February and March**

- A. An internal Budget Team is created (Elementary, Middle, & High school principals, BEA/Teacher Representative, OSEA Representative, District administrators). The Internal Budget Team will serve as a source of information for the Budget Committee.
- B. The Internal Budget Team will build a comprehensive budget corresponding to the Strategic Plan, student growth targets, state compact, School Board policies and priorities and input from principals,

Teaching and Learning, community and listening sessions. This process will begin with the current staffing and service levels, and allocations will be modified to balance to the projected funding levels for 2015-16. The team will build a budget based on what is required under law and policy, the District Strategic Plan, what is known as educators, and other considerations corresponding to data received from the Board and community. The Internal Budget Team will prepare multiple scenarios to respond to the change in funding levels throughout the Oregon Legislative Session.

- C. Superintendent will hold a Listening and Learning Sessions in January with a brief presentation to inform the public about the budget process. There will be an opportunity for Budget Committee members to meet one another and give input to the Internal Budget Team as they are creating the proposed budget. It will provide the public with an opportunity for dialogue and to learn about the resources available.
- D. Three Regional Budget Listening and Learning Sessions will be scheduled in February and March to inform of initial funding levels/budget capacity and to gather input from the community. The meetings will be scheduled in schools in the northern, central and southern regions of the District. One session will be conducted in Spanish with English translation. Board and Budget Committee members will attend their regional session. Staff members will present information and record input to be shared with all members of the Budget Committee.
- E. Staffing allocations will be distributed in mid to late February.

#### **Phase 4: April, May and June**

- A. First Budget Committee Meeting is held. Meeting materials will be shared with the Budget Committee before the meeting, and materials will be made available to news media and the community on the evening of the first Budget Committee meeting. The Budget Committee receives the budget message and reviews figures and accuracy of the proposed budget. The Internal Budget Team will communicate the comprehensive view of changes to the budget. Public testimony will be taken. The Budget Committee asks questions and requests additional information to be provided at the next scheduled meeting. Questions and answers will be posted on the District website for the Budget Committee and community to access.
- B. In the second Budget Committee meeting, the Committee will invite and listen to public testimony. The District will collect questions and queries from previous meetings and present answers and information to the Committee. The Budget Committee will discuss budget and information presented.
- C. In the final meeting, the Budget Committee will make any changes to the proposed budget at the appropriation level by motion and vote. The Budget Committee will approve the budget and tax levies by resolution and vote.
- D. The State of Oregon will release an updated Economic Forecast in May.
- E. A budget summary and Notice of Budget Hearing will be advertised in the local newspaper. The School Board will hold a budget hearing, adopt the budget, and make appropriations and approve tax rates.
- F. Adjustments will be made to staffing as needed due to changes from the proposed to adopted budget

---

**BEAVERTON SCHOOL DISTRICT  
2015 – 2016 DISTRICT BUDGET CALENDAR**

<b>August 25, 2014</b>	<b><i>School Board Meeting 6:30 pm</i></b> Budget Committee openings and application process discussion <i>Location: Administration Center</i>
<b>October 15, 2014</b>	<b><i>School Board Workshop 9:00 am</i></b> Budget Process and Calendar discussion
<b>October 27, 2014</b>	<b><i>School Board Meeting 6:30 pm</i></b> Approve Budget Process and Calendar Appoint Budget Committee Members to fill vacancies <i>Location: Administration Center</i>
<b>December TBD, 2014</b>	<b><i>School Board Workshop 6:30 pm</i></b> Discuss Long Term Financial Goals, invite Budget Committee to attend <i>Location: Administration Center</i>
<b>December 15, 2014</b>	<b><i>School Board Meeting 6:30 pm</i></b> Approve Financial Goals <i>Location: Administration Center</i>
<b>January 20, 2015</b>	<b><i>Superintendent Budget Listening &amp; Learning Session 6:30 pm</i></b> <i>Location: Administration Center</i>
<b>February &amp; March, 2015</b>	<b><i>Three Regional Budget Listening &amp; Learning Session 6:30 pm</i></b> Two sessions in English and one session in Spanish <i>Location: Schools in the northern, central and southern regions of District</i>
<b>April 6, 2015</b>	<b><i>Budget Committee Meeting 6:30 pm</i></b> Elect Budget Committee Officers, propose budget, deliver budget message, receive public testimony and receive Internal Budget Team presentation <i>Location: Aloha High School Commons</i>
<b>April 20, 2015</b>	<b><i>Budget Committee Meeting 6:30 pm</i></b> District presents information in response to questions and queries, Public Testimony, and Budget Committee discussion <i>Location: Administration Center</i>
<b>May 4, 2015</b>	<b><i>Budget Committee Meeting 6:30 pm</i></b> Budget Committee discussion, no Public Testimony, Approval of Budget and Tax Levies <i>Location: Administration Center</i>
<b>June 1, 2015</b>	<b><i>School Board Meeting 6:15 pm</i></b> Budget Public Hearing, Board Adopts Budget and Tax Levies <i>Location: Administration Center</i>

## Budget Process Calendar

	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Develop Enrollment/ADM Projections												
Develop/Refine Revenue Projections												
Develop/Refine Staffing Projections												
Conduct Staffing Process with School Administrators												
Collect Data, Conduct analysis and assessment for Identified Programs and Activities – Review with Achievement Compact Advisory Committee												
Develop Recommendations for Reallocation of Resources												
Develop Financial Goals												
Identify Programs/Activities for assessment and develop assessment plan												
Budget Development												
Prepare Proposed Budget and Budget Listening and Learning Sessions												
Budget Committee Receives and Approves Budget												
Board Holds Budget Hearing Adopts Budget												

- Facilities Action
- Finance Action
- Human Resources Action
- Teaching and Learning Action
- Internal Budget Team Action
- Budget Committee/ Board Action