



BOARD MEETING DATE
October 8, 2012

FINANCIAL GOALS AND BUDGET PROCESS

POLICY ISSUE/SITUATION

The Superintendent's recommendation for the District's Financial Goals, Budget Process and Calendar for 2013-14 are presented for School Board review.

RECOMMENDATION:

It is recommended the Beaverton School District Board of Directors review the proposed Budget Process, Calendar and Financial Goals for 2013-14.

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.

2013-14 Budget Process

Phase 1: September and October

- A. The process to appoint vacant Budget Committee positions will be determined at the September Business Meeting and will be advertised across the District.
- B. In October 2012, 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 2012-13 school year. The Board will discuss, give suggestions and reach consensus on the process and calendar during the October Work Session and approve at the October Business Meeting.
- C. The District will publicize the Budget Process with the internal and external community.

Phase 2: November and December

- A. Individual Board members will review the 2013-14 process with continuing Budget Committee members. Budget Officer Claire Hertz will provide orientation to new Budget Committee members.
- B. State of Oregon Economic Forecast will be released in late November.
- C. Governor Kitzhaber will release 2013-14 Budget by December 1. Budget Officer Claire Hertz will develop initial estimated resources and budget capacity for the District in 2013-14.

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 opposed to staff serving as ad hoc Budget Committee members.
- 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 community survey and listening sessions. This process will begin with the current staffing and service levels based on the zero-based budget created through the

budget process of 2012-13, and will modify allocations to balance the new funding levels for 2013-14. The team will build a budget based on what is required, what is known as educators, and other considerations corresponding to data received from the Board and community.

- C. The Superintendent holds Budget Listening and Learning Sessions in January and February with a brief presentation to inform the public about the budget process. The School Board and Internal Budget Team members will facilitate the session. It will provide the public with an opportunity for dialogue and to learn about the resources available for 2013-14.
- D. Staff budget sessions will be scheduled in March to inform staff of initial funding levels and budget capacity for 2013-14.

Phase 4: April, May and June

- A. Budget Committee is assembled for the first time. 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 the changes to be expected at the elementary, middle and high school. 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 or vote.
- D. 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.

Beaverton School District Financial Goals for 2013-14

The District will develop a budget to:

1. Meet the expectations of our School Board priorities, strategic plan, community values and contractual obligations.
2. Produce a document that clearly articulates a District financial plan, which includes opportunity for local funding measures for the next two years that aligns with our District priorities.
3. Rebuild a fund balance in General Fund to support future bond issues and ensure good financial health of the District:
 1. 2013-14 4.25%
 2. 2014-15 5.00%
4. Support Board advocacy for stable and adequate statewide funding for education.



BEAVERTON SCHOOL DISTRICT 2013 – 2014 DISTRICT BUDGET CALENDAR

- October 8, 2012 *School Board Workshop 8:00am*
Budget Process Discussion
Location: Health & Science High School
- October 29, 2012 *School Board Meeting 6:30 pm*
Approve Budget Process and Calendar
Discuss Selection of Budget Committee Members to Fill Vacancies
Location: Administration Center
- November 13, 2012 *School Board Meeting 6:30 pm*
Appoint Budget Committee Members to Fill Vacancies
Location: Administration Center
- January 22, 2013 *Superintendent Budget Listening & Learning Session 6:30 pm*
Location: Aloha High School Commons
- February 12, 2013 *Superintendent Budget Listening & Learning Session 6:30 pm*
Location: TBA

Budget Sessions for Staff will be scheduled in the Month of March.

- April 22, 2013 *Budget Committee Meeting 6:30 pm*
Elect Budget Committee Officers, Proposed Budget, Budget Message, Public Testimony
and Strategic Budget Team Presentation
Location: TBA
- May 6, 2013 *Budget Committee Meeting 6:30 pm*
District presents information in response to questions and queries, Public Testimony, and
Budget Committee discussion
Location: TBA
- May 13, 2013 *Budget Committee Meeting 6:30 pm*
Budget Committee discussion, Approval of Budget and Tax Levies
Location: TBA
- June 3, 2013 *School Board Meeting 6:30 pm*
Budget Hearing/Board Adopts Budget and Tax Levies
Location: Administration Center

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The meeting location is accessible to persons with disabilities. A request for an interpreter for the hearing impaired, or for other accommodations for persons with disabilities, should be made at least 48 hours in advance of the meeting. Please contact Community Involvement Office at 503-591-4360.