

2014-15 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.

Phase 2: November and December

- A. In November and December 2013, 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 2013-14 school year. The Board will discuss, give suggestions and reach consensus on the process and calendar during the November Business Meeting and approve at the December Business Meeting.
- B. The District will publicize the Budget Process with the internal and external community.
- C. Individual Board members will review the 2014-15 process with continuing Budget Committee members. Budget Officer Claire Hertz will provide orientation to new Budget Committee members.
- D. State of Oregon Economic Forecast will be released in late November.
- E. Budget Officer Claire Hertz will develop initial estimated resources and budget capacity for the District in 2014-15.

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 community and listening sessions. This process will begin with the current staffing and service levels based on the zero-based budget created in 2012-13 and adjusted for 2013-14, and allocations will be modified to balance to the new funding levels for 2014-15. 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.

- C. Superintendent holds 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 Internal Budget Team prior to creating a budget. It will provide the public with an opportunity for dialogue and to learn about the resources available for 2014-15.
- D. Board Zone Budget Listening and Learning Sessions will be scheduled in February and March to inform of initial funding levels/budget capacity for 2014-15 and to gather input from the community. Each meeting will have a Board member, Budget Committee member and staff member.
- E. Staffing allocations will be distributed on March 3.

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. 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.
- E. Adjustments made to staffing as needed due to changes from the proposed to adopted budget.