

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.