



BOARD MEETING DATE
November 18, 2013

BUDGET CALENDAR AND BUDGET PROCESS

POLICY ISSUE/SITUATION

The Superintendent's recommendation for the District's Budget Process and Calendar for 2014-15 are presented for School Board review.

RECOMMENDATION:

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

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.



BEAVERTON SCHOOL DISTRICT 2014 – 2015 DISTRICT BUDGET CALENDAR

- November 18, 2013 ***School Board Meeting 6:30 pm***
Budget Process Discussion
Location: Administration Center
- December 16, 2013 ***School Board Meeting 6:30 pm***
Approve Budget Process and Calendar
Appoint Budget Committee Members to Fill Vacancies
Location: Administration Center
- January 21, 2014 ***Budget Listening & Learning Session 6:30 pm***
Location: Beaverton High School Cafeteria
- February 3 – March 15, 2014 ***Board Zone Budget Listening and Learning Sessions***
Location: Schools to be announced
- April 14, 2014 ***Budget Committee Meeting 6:30 pm***
Elect Budget Committee Officers, Proposed Budget, Budget Message, Public Testimony
and Internal Budget Team Presentation
Location: Sunset High School Commons
- May 5, 2014 ***Budget Committee Meeting 6:30 pm***
District presents information in response to questions and queries, Public Testimony, and
Budget Committee discussion
Location: Aloha High School Commons
- May 14, 2014 ***Budget Committee Meeting 6:30 pm***
Budget Committee discussion, no Public Testimony, Approval of Budget and Tax Levies
Location: Administration Center
- June 2, 2014 ***School Board Meeting 6:30 pm***
Budget Public 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.

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 through the budget process of 2013-14, and will modify allocations to balance the new funding levels

for 2014-15. 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. 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.