

DATE: February 28, 2012

TO: Board of Trustees

FROM: Edgar Schmidt, Superintendent of Schools

SUBJECT: Process and Timeline for 2012-2013 Planning

ORIGINATOR: Brian Smith, Executive Director, Finance & Infrastructure

RESOURCE STAFF: Sandra Bassett, Cheryl Hagen

REFERENCE: *The School Act*
http://www.qp.alberta.ca/574.cfm?page=s03.cfm&leg_type=Acts&isbncln=9780779733941

ISSUE

On or before May 31, school boards are required to prepare and submit to the Minister a budget for the fiscal year beginning on the following September 1 of a given year.

RECOMMENDATION

That the process and timeline for review of the 2012-2013 proposed budget, as outlined in Attachment I, be approved.

BACKGROUND

The development of the process and timeline for the approval of the 2012-2013 district budget is dependent on two key dates. The first is the announcement of the provincial budget which occurred on February 9, 2012. The second is the provincial reporting requirement as per the *School Act*. As requested and granted during the 2010-2011 budget process, the District will need to extend the timeline for submission of the budget report to Alberta Education to June 13 to accommodate the proposed timeline.

The attached process and timeline outlines key dates necessary to meet the target date for the approval of the proposed budget. In order to allow sufficient time for planning, and to align the process for approval of the proposed budget with the trustees' schedule, it is recommended that an additional meeting be held on May 15 so as to provide trustees an opportunity to review the proposed budget in conference prior to public board on May 22.

RELATED FACTS

The proposed budget is based on the distribution of funds and the basis of allocation, which are developed in tandem. The distribution of funds establishes a pool of resources for the collective of schools and central decision units whereas the basis of allocation determines how those resources are distributed to each specific school or decision unit. The distribution of funds is established with the Board's approval and the basis of allocation is determined by the Superintendent.

NEXT STEPS

- If approved by trustees on February 28, the Process and Timeline will be distributed to principals and central administrative staff on February 29.
- Trustees will review the proposed budget at public board on May 22.
- The proposed budget will be recommended to trustees at public board on June 12.
- If approved, the proposed budget will be submitted to Alberta Education on June 13.

ATTACHMENTS

ATTACHMENT I Process and Timeline for 2012-2013 Planning (Calendar)

ATTACHMENT II Process and Timeline for 2012-2013 Planning (Detail)

SB : kr

PROCESS AND TIMELINE FOR 2012-2013 PLANNING (Calendar)

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
APR	1	2	3 Conference (am) Distribution of Funds to Conference	4	5	6 Good Friday	7
	8	9 Easter Monday	10 Board (2-6pm) Distribution of Funds to Board	11	12	13	14
	15	16	17	18	19	20 Projected Allocations to Schools and Central	21
	22	23	24	25	26	27	28
MAY	29	30	1 Conference (am)	2 School & Central Proposed Budgets Due	3	4	5
	6	7	8 Board (2-6pm)	9	10	11	12
	13	14	15 Special Conference Introduction & Review of 2012-2013 Proposed Budget	16	17	18	19
	20	21 Victoria Day	22 Board (2-6pm) Introduction & Review of 2012-2013 Proposed Budget	23	24	25	26
JUN	27	28	29 Conference (am)	30	31	1	2
	3	4 ASBA	5 ASBA	6 SLM	7	8	9
	10	11	12 Board (2-6pm) Approval of the 2012-2013 Proposed Budget	13 District 2012-2013 Budget Report Submitted to Alberta Education	14	15	16
	17	18	19	20	21	22	23
	24	25	26	27 Last Day of Instruction	28	29 Last Day of Operation	30

PROCESS AND TIMELINE FOR 2012-2013 PLANNING (DETAIL)

Spring/Planning Timeline	Process
February 28, 2012	<ul style="list-style-type: none"> • Process and Timeline for 2012-2013 Planning is recommended to Board
February 29, 2012	<ul style="list-style-type: none"> • Process and Timeline for 2012-2013 Planning is communicated to schools and central decision units
April 3, 2012	<ul style="list-style-type: none"> • Distribution of Funds is presented to Conference
April 10, 2012	<ul style="list-style-type: none"> • Distribution of Funds is recommended to Board
April 20, 2012	<ul style="list-style-type: none"> • Schools and central departments receive projected allocations and requirements
May 2, 2012	<ul style="list-style-type: none"> • Schools and Central departments proposed budgets uploaded in BPS
May 22, 2012	<ul style="list-style-type: none"> • The Superintendent will introduce the proposed budget to Board • The Board will review the District Plan and financial information
June 12, 2012	<ul style="list-style-type: none"> • The Board approves the 2012-2013 Budget
June 13, 2012	<ul style="list-style-type: none"> • The District's 2012-2013 Budget Report is submitted to Alberta Education