

5060 School Operating Budgets

Policy 5060

STATUS: ADOPTED

SCHOOL OPERATING BUDGETS - SCHOOL BASED MANAGEMENT

Board Approved and Codified: March 17, 1986

Last Revised: June 19, 2013

Description:

The Board of Education believes that the most important environment affecting student learning is the school. Furthermore, the Board believes that the decision-making is most effective when conducted by the group most closely affected by the decisions. In recognition of this and subject to the overall supervision and monitoring of the Superintendent, the Board endorses the financing of its schools for operating purposes through a decentralized approach involving the allocation of funds to the schools through formulas established by the Secretary Treasurer on a school year basis.

The Board expects school based funds to be allocated so as to:

- maximize learning opportunities for children
- provide appropriate resources within the limits set by revenue
- maximize community/staff involvement and understanding of the budget and targets for expenditure
- focus on long and short range school planning developed as a result of assessment activities

The Board expects its administrative officers to develop procedures governing the replacement of instructional equipment. Further, the Board recognizes that instructional equipment being replaced should be offered to serve a useful purpose in the school or somewhere else in the school district.

Commonality of equipment and an appropriate budgeting and purchasing procedure is to be given particular emphasis. Specifically, schools must consult with the District Facilities Manager on equipment purchases regarding brands and specifications if they are anticipating that they may receive technical repair and support from facilities staff at a later time.

In recognition that planning is generally beyond a single school year and that principals must develop contingency funds to address enrolment fluctuations, the Board will permit school based surpluses and deficits in the budgetary procedures. All deficits, and surpluses that are larger than expected, must be discussed with the Secretary Treasurer.

School based decisions must, at all times, be in accordance with the Criminal Code, existing Collective Agreements, Ministry and Board Policies and Regulations and directives from the Superintendent of Schools.

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Description:

1. The Superintendent in collaboration with the Secretary Treasurer is responsible for developing an annual budget based on the revenue available to the District. They will establish a set of formulas to provide funds to schools for the provision of educational services.
2. Trustees and principals will receive an overview of the details of the overall budget, the formulas developed to fund schools and programs, and an assessment of the impact of the budget on each school and special programs or services.
3. Principals will develop a preliminary enrolment figure for the upcoming school year on data established by the Superintendent to establish initial school revenue and permit budget and staffing plans.
4. Principals will submit a preliminary budget plan, after soliciting input from staff and parents based on their enrolment estimate, on a date determined by the Secretary Treasurer in consultation with the Superintendent.
5. Subject to the initial approval of the budget plan by the Secretary Treasurer and Superintendent, principals may be required to provide a greater description of the school's budget plan at a special meeting convened for this purpose.
7. The Superintendent in collaboration with the Secretary Treasurer will establish final budgets for schools using the actual enrolment of the school as of the third Friday in September. Schools experiencing a loss of enrolment will have the revenue adjusted in proportion to the change in enrolment. Similarly, schools experiencing an increase in enrolment will receive a proportional increase in the revenue.
8. The Board will receive a report from the Secretary Treasurer and/or Superintendent on the changes made to the provisional budget due to enrolment changes.
9. Principals will receive by a date determined by the Secretary Treasurer in consultation with the Superintendent (or designate), an estimate of funding available for named special education students to be enrolled in their school in the subsequent school year.
10. The Director of Learning Services will retain contingency funds to provide short term or emergency assistance for additional children with special needs who arrive in the district.
11. Revenue adjustments to schools for special education low incidence high cost programs will be made based on the actual enrolments at the end of the second week of September.

12. The Superintendent of Schools may recommend to the Board the need for District funded additions to school budgets, to meet special needs and/or priority programs.

13. Principals are to submit to the Superintendent a school learning plan for the following school year by the end of May.

14. All staffing allocations will be determined by the final school based plan as approved by the Superintendent. No staffing formulas will be established.

15. Inventoried equipment may be replaced in accordance with this regulation.

A. School Based Funds

1) Equipment being replaced will be classified in one of the following ways:

- a) still usable in school - equipment will be left in the school
- b) still usable in system - equipment will be moved by Maintenance to where it will be used. (This will be distributed to receiving schools at no cost.)
- c) unusable or worn out - equipment will be disposed of as per POLICY 5110.

2) The Maintenance Department will deliver all equipment purchased through the district.

3) Principals are directed to maintain an updated inventory of equipment indicating the source of funds for the purchase and to assure that commonality of electronic equipment is maintained.

B. Equipment Replacement

Schools must develop a budget plan that is for the immediate year and for 2-3 years into the future to ensure that as replacements are required, the budget has been developed to provide the funding for that replacement. Equipment that must be part of the plan are computers, copiers, desks, chairs, AV equipment, labs shop and gym equipment and so on... Lockers are to be planned on a 50% cost shared basis school/district.