

2010-2011 OUSD BUDGET DEVELOPMENT CALENDAR FOR ACADEMIC AND FISCAL SOLVENCY

		Stakeholder Codes: S--Sites; P--Principals; ET--Executive Team; C--Cabinet; BC--Board Committee; B--Board; FS--Financial Services; S&F--State & Federal Compliance; HR--Human Resources; Co--Community; TS--Tech Services; SPM--School Portfolio Mgmt												
Month	Task	S	SPSA	P	ET	C	BC	B	FS	S&F	HR	Co	TS	SPM
Aug.														
	Create Budget Development Calendar					X			X					X
	Strategic framework for budget alignment and decision making developed					X			X					X
Sept.														
	Strategic Alignment: Phase I Analysis and Scenario Reviews													
	Budget Development Calendar and Strategic Framework submitted for approval						X	X						
	School Portfolio Management: Refine and clarify criteria and present plan for Focus Schools					X	X	X	X					X
	Exec Team/ Cabinet: Build budget knowledge, strategic priority recommendations				X	X								
	Strategic Communications: Develop programmatic and budget documents					X			X					X
Sept-Nov	Board Budget Engagement Sessions: Host at least one session for each "Board District"											X		
Oct														
	Strategic Alignment: Phase I Analysis and Scenario Reviews													
5-Oct	Executive Team Budget Retreat				X	X								
	City Wide Forum for Superintendent and broad cross section of stakeholders					X						X		
Sept-Nov	Board Budget Engagement Sessions: Host at least one session for each "Board District"							X				X		
	Superintendent Ad-Hoc Budget Advisory Session (e.g. key stakeholders including unions)					X						X		
	Asset Management Plan update					X								
	Strategic Communications: Develop budget communications plan and tools					X								
	School Portfolio Management: Engagement with identified Focus Schools											X		X
	Budget Principal Advisory Group launched: 2 meetings			X		X			X					
27-Oct	All Site Administrators Meeting: Budget development overview			X		X			X					
29-Oct	School Portfolio Management: Draft enrollment projections and recap to Cabinet					X								X

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Nov															
	Strategic Alignment: Phase I Analysis and Scenario Review														
	City Wide Forum for Superintendent and broad cross section of stakeholders					X						X			
Sept-Nov	Board Budget Engagement Sessions: Host at least one session for each "Board District"							X							
	Strategic Budget Sessions with key stakeholders at schools (e.g. SSC's) and Central Office teams	X			X	X									
	Budget Study Session with Superintendent and Executive Team				X	X									
	Superintendent Ad-Hoc Budget Advisory Session (e.g. key stakeholders including unions)					X						X			
	School Portfolio Management: Recommendations for focus schools to Cabinet, Board					X			X					X	
12-Nov	SPM, Cabinet and FS review implications of enrollment projections					X			X					X	
18-Nov	Board adopts 2010-2011 Strategic Budget Priorities.							X						X	
Dec															
	Strategic Alignment: Phase II/ Decisions, Funding reductions/ re-alignment				X	X									
	Budget Study Session with Superintendent and Executive Team				X	X									
	Strategic Budget Superintendent Ad-Hoc Advisory Session (e.g. key stakeholders including unions)					X						X			
9-Dec	School closure recommendations to Board					X		X						X	
9-Dec	Board: 2009-10 1st Interim adoption							X							
9-Dec	Board: Reviews 2010-11 budgeting process, RBB & SPSA							X							
16-Dec	Board: School closure decisions							X							
12/7-12/12	Site-based enrollment projections developed, appeals process begins (2nd week)	X							X						
	Draft of 2010-11 Budget Handbook published for review by Cabinet					X			X						
	Implementation of approved modifications to RBB policy and process								X						
12/7-12/12	BOE retreat: Discuss 2010-11 budget development calendar and Board study sessions (2nd week)					X	X	X	X						
12/21-12/25	Accounting begins revenue forecast for 2010-11 fiscal year (3rd week)								X						
12/28-12/31	RBB tool prepared with initial snapshot of current year labor and non-labor (4th week)								X						
12/14-12/18	SPSA - 2010-2011 Draft Action Plan	X			X					X					
16-Dec	Board: Adopts SPM recommendations							X							
16-Dec	Board: Reviews Superintendent's budget targets for schools & central office							X							
Sept-Dec	SPSA - Fall Cycle of Inquiry and Planning: Evaluating Implementation of Key strategies with 09 CST, Fall Benchmark, Fall School Climate, and Fall PD data	X			X					X				X	
Dec-Feb	SPSA - Conduct SPSA/ RBB training	X			X				X	X			X	X	
Dec-Feb	SPSA - Conduct SPSA parent trainings	X			X					X		X		X	

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Jan															
	Strategic Alignment: Phase II/ Decisions, Funding Reductions/ Re-alignment				X	X									
15-Jan	Options Window closes	X										X			
01/11-01/15	Accounting completes revenue forecast for 2010-11 fiscal year (2nd week)								X						
01/11-01/15	Governor releases state budget proposal (2nd week)								X						
01/18-01/22	1st Board study session held on 2010-11 budget (3rd week)						X	X	X						
01/18-01/22	Cabinet reviews Governor's budget proposal and prioritizes Central Office allocations (3rd week)					X			X						
01/18-01/22	Enrollment appeals process completed, enrollment finalized (Targets Set 3rd week)	X							X						
01/25-01/29	RBB allocations (Central and school) determined and loaded (Targets Set 4th week)								X	X					
01/25-01/29	Final draft of 2010-11 Budget Handbook published (4th week)								X						
27-Jan	Board: Reviews & Approve Superintendent's strategic central office expenditures for 2010-11														
	Central Office managers engage in program inquiry process; Principals/NExOs in results-based inquiry	X							X						
Jan-June	Student Assignment: Support transfers of students from closing schools								X			X			
	Finalize Enrollment Projections								X					X	
	Determine use for closing school's facilities (School Closures)					X			X					X	
Jan-Feb	SPSA - Mid-year Cycle of Inquiry with 2010-11 draft SPSA and RBB/ cost implications	X			X					X					
Dec-Feb	SPSA - Conduct SPSA/ RBB training	X			X					X					
Dec-Feb	SPSA - Conduct SPSA parent trainings	X			X					X					
Feb															
	Strategic Alignment: Phase III/ Implementation Planning								X						
	Staffing model completed based on Governor's January budget								X						
	Board: Reviews projected certificated & classified layoffs by job category.							X							
	Board: Approves a resolution to issue March 15 notices to Certificated Staff.														
02/01-02/05	RBB opened for schools and central office (1st week)	X							X						
02/08-02/26	RBB sessions held for schools complete by 3/1 (2nd to 4th week)	X							X		X				
Jan-June	Student Assignment: Support transfers of students from closing schools								X			X			
	RBB/SPSA trainings for schools; NExOs meet with schools to develop prelim SPSA/align budget	X							X	X	X				
	Generate school budgets based on finalized enrollment projections								X						
Dec-Feb	SPSA - Conduct SPSA/RBB training	X			X					X					
Dec-Feb	SPSA - Conduct SPSA parent trainings	X			X					X					
Feb-Mar	SPSA - Final Plan and budget with RBB tool	X			X				X				X		
Feb-Mar	SPSA - Provide technical assistance to Red schools/PI Y4 & Y5	X			X					X			X		

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Mar															
	Strategic Alignment: Phase IV/ Implementation				X	X			X						
10-Mar	Board: Reviews & adopts Superintendent's proposed 2010-2011 personnel reductions.							X							
10-Mar	Board: Reviews & adopts 2009-2010 Second Interim Budget Report.							X							
15-Mar	3/15 letters to certificated staff and consolidations submitted to HR										X				
03/08-03/26	RBB sessions held for central office complete by (2nd to 4th week)	X							X		X				
03/15-03/19	1st draft of District budget available (K-12 3rd week)								X						
	Budget completes matching of org keys in RBB (K-12)								X						
	Budget moves fiscal and personnel data from RBB to IFAS (K-12)								X				X	X	
Jan-June	Student Assignment: Support transfers of students from closing schools								X			X			
	Generate School Budgets Based on finalized enrollment projections								X						
Feb-Mar	SPSA - Final SPSA plan and budget with RBB tool	X			X				X				X		
Feb-Mar	SPSA - Provide technical assistance to Red schools/ PI Y4 & Y5	X			X					X			X		
Apr															
	Strategic Alignment: Phase IV/ Implementation								X						
	Board: Review's Superintendent's summary of actual staffing & prog cuts from schools								X						
04/05-04/09	Fiscal Services validates budget data in IFAS, begins tech review for SACS (K-12 1st week)								X						
04/05-04/09	Targets are re-deliberated (1st week)					X			X						
04/12-04/16	Adjustments made as a result of deliberated targets (2nd week)								X						
04/19-04/23	Budget completes matching of org keys (3rd week)								X						
04/19-04/23	2nd Board study session held on 2010-11 budget (3rd week)						X	X	X						
04/26-04/30	Budget moves fiscal and personnel data from RBB to IFAS (Central Office 4th Week)								X				X	X	
	Generate school budgets based on finalized enrollment projections								X						
	Staff Reassignment (School Closures and Consolidations)								X		X				
04/26	Schedule of 2010-2011 budget inspection & hearing dates to ACOE								X						
Apr-Jun	SPSA - Collect SPSAs, review, and prepare for Board	X			X		X	X		X					
May															
	Strategic Alignment: Phase IV/ Implementation								X						
05/10-05/14	Governor's May Revise budget released (2nd week)								X						
	Adjustment to allocations (as necessary)								X						
	Documents prepared for adoption budget submission to ACOE								X						
	Public Inspection of drafty 2010-11 budget						X	X	X						
26-May	Board: Reviews & adopts 2009-2010 3rd Interim Budget Report.														
	Budget prepared for 1st reading								X						
Apr-Jun	SPSA - Collect SPSAs, review, and prepare for Board	X			X		X	X		X					

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June														
06/02	Budget adoption submitted to Board for review in 3rd week (Jun. 2nd)						X	X	X					
06/09	Board: Reviews Superintendent's proposed 2010-2011 budget													
06/07-06/11	1st reading of 2010-11 adoption budget (2nd week)						X	X						
06/08	2010-2011 Budget publication						X	X						
06/11	2010-2011 Budget public Inspection						X	X						
06/16	Final budget delivered for adoption							X	X					
06/16	Public Hearing for adoption							X						
	Documents finalized for adoption budget submission to ACOE									X				
06/23	Board: Adopts 2010-2011 Budget.													
Apr-Jun	SPSA - Collect SPSAs, review, and prepare for Board	X			X		X	X		X				