

DATE: March 22, 2022

TO: Board of Trustees

FROM: Darrel Robertson, Superintendent of Schools

SUBJECT: Process and Timeline for the 2022-2023 Budget and for the Fall Review of the 2021-2022 Results and the Plans for 2022-2023

ORIGINATOR: Todd Burnstad, Chief Financial Officer

RESOURCE STAFF: Jeremy Higginbotham, Nancy Petersen, Madonna Proulx, Soleil Surette

REFERENCE: [Province of Alberta Education Act](#)

ISSUE

School divisions are required to prepare and submit a Board-approved budget to the Minister of Education by May 31 of each year for the fiscal year beginning on the following September 1. As well, school board planning and results reporting must be completed no later than November 30. To assist Division staff and the Board of Trustees with the planning process, Financial Services develops a process and timeline calendar for approval by the Board of Trustees.

BACKGROUND

The 2022-2023 Provincial Budget was announced on February 24, 2022; however, individual school division funding profiles are not anticipated to be available until the end of March 2022. To accommodate the time required for site-based budgeting, the Process and Timeline for the approval of the 2022-2023 Budget has been developed (Attachment I).

The Board of Trustees also approves the process and timeline for review of the previous year's results and the review of the plans established for the current school year. Through discussions, they have an opportunity to learn about the results achieved by schools and central decision units and the implications those results may have on their 2022-2023 plans. Trustees also gain an understanding of how schools and central departments developed their plans in support of Division priorities.

Schools and central decision units will report on their results achieved from the goals that were established for 2021-2022. They will also identify the biggest challenges and improvement opportunities that will impact their 2022-2023 plans which details priority, high-impact goals for the upcoming school year.

RELATED FACTS

- The Distribution of Funds report is to be presented at the Caucus meeting on April 5, 2022, and at the April 19, 2022, public Board meeting.
- School results review meetings will be scheduled to take place during the month of November 2022. For these meetings, Trustees, in collaboration with assistant superintendents, will facilitate a group dialogue.
- The detailed school and central results review meeting schedules will be provided in the fall.

- As in previous years, the school decision units with first- and second-year principals will be reviewed by assistant superintendents. These meetings will be scheduled by the assistant superintendents prior to November 30, 2022.

RECOMMENDATION

- 1. That the Process and Timeline for the 2022-2023 Budget as outlined in Attachment I, be approved.**

NEXT STEPS

- If approved, the 2022-2023 budget process and timeline will be communicated to principals and central decision unit leaders.
- The 2022-2023 Budget will be presented at the May 27, 2022, Special Board Meeting, in anticipation of the final budget report being submitted to the Province by the May 31, 2022 deadline.

ATTACHMENTS and APPENDICES

ATTACHMENT I Process and Timeline for the 2022-2023 Budget (Calendar)

MP:ja

2022-2023 Budget Timeline

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
FEB	30	31 PD Day - No Students	1 CAUCUS BOARD 2:00PM	2	3	4	5
	6	7	8	9	10	11	12
	13	14	15 BOARD 2:00PM	16	17	18	19
	20	21 FAMILY DAY	22	23	24 PROVINCIAL BUDGET ANNOUNCEMENT	25	26
MAR	27	28	1	2	3 Teachers' Convention	4 Teachers' Convention	5
	6	7	8 CAUCUS BOARD 2:00 PM	9	10	11	12
	13	14 Projected Enrolment Principal Input Opens	15	16	17	18	19
	20	21	22 BOARD 2:00PM Process & Timeline Recommendation MARS #14902	23 Projected Enrolment Principal Input Closes	24	25	26
	27	28 SPRING BREAK	29 SPRING BREAK Projected Enrolment File forwarded to Budget & Funding	30 SPRING BREAK	31 SPRING BREAK	1 SPRING BREAK	2

2022-2023 Budget Timeline

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
APR	3	4	5 CAUCUS Introduction - Distribution of Funds MARS #14903	6	7	8	9
	10	11	12	13	14	15 GOOD FRIDAY	16
	17	18 EASTER MONDAY	19 BOARD 2:00PM 2022-2023 Distribution of Funds Recommendation MARS#14904 PD Day - No Students	20	21	22 BPS OPENS	23
	24	25	26	27	28	29 BPS CLOSSES	30
MAY	1	2 PD Day - No Classes	3 CAUCUS BOARD 2:00pm	4	5	6	7
	8	9	10	11	12	13	14
	15	16	17 BOARD 2:00PM	18	19	20 Non- Instructional Day	21
	22	23 VICTORIA DAY	24 Teacher Day in Lieu	25 Non- Instructional Day	26	27 Special Board Time TBD Approval of the 2022-2023 Budget MARS #14908	28
	29	30	31 Budget Report Due to Alberta Education	1	2	3 PSBAA Spring General Meeting June 4-6	4
JUN	5	6 ASBA SGM Business Mtg	7 AUDIT/ CAUCUS BOARD 2:00PM	8	9	10	11

2022-2023 Budget Timeline

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
OCT	2	3	4 CAUCUS BOARD 2:00 PM (Tentative)	5 Enrolment File to Budget & Funding	6	7 Results Review & Planning Opens	8
	9	10 THANKSGIVING	11	12	13	14	15
	16	17 BPS opens for fall budget	18 BOARD 2:00 PM (Tentative)	19	20	21 PD Day - No Students	22
	23	24 PD Day - No Students	25	26	27	28 Budget due Results Review & Plans Due	29
NOV	30	31	1 CAUCUS BOARD 2:00 PM (Tentative)	2	3	4 Target Date to Distribute Results Review & Plans to Trustees & Asst. Superintendents	5
	6	7	8	9	10	11 REMEMBRANCE DAY	12
	13	14 Teacher Day in Lieu PSBAA Nov 14-17 (tentative)	15 Non- Instructional Day ASBA FGM Nov (tentative)	16 School Results Review (tentative)	17 School Results Review (tentative)	18 School Results Review (tentative)	19
	20	21 Central & School Results Review (tentative)	22 Central & School Results Review (tentative)	23	24	25 Audit Committee Presentation of Audited Financial Statements	26
	27	28	29 BOARD 2:00PM Audited Financial Statements presented to Board	30 Audited Financial Statements due to the Province			

**PROCESS AND TIMELINE FOR THE
2022-2023 BUDGET (DETAIL)**

Timeline	Process
March 22, 2022	<ul style="list-style-type: none"> • Process and Timeline for 2022-2023 Budget is recommended to the Board of Trustees
April 5, 2022	<ul style="list-style-type: none"> • Distribution of Funds report is presented to Caucus
April 19, 2022	<ul style="list-style-type: none"> • Distribution of Funds is recommended to Board
April 22, 2022	<ul style="list-style-type: none"> • Schools and central departments receive allocations and budget requirements
April 29, 2022	<ul style="list-style-type: none"> • Schools and Central departments budgets are due
May 27, 2022	<ul style="list-style-type: none"> • The 2022-2023 Budget is recommended to the Board of Trustees

**PROCESS AND TIMELINE FOR THE
2021-2022 FALL RESULTS REVIEW AND 2022-2023 PLANS (DETAIL)**

Timeline	Process
October 7, 2022	<ul style="list-style-type: none"> • Results Review & Planning open
October 28, 2022	<ul style="list-style-type: none"> • Results Review & Plans Due
November 4, 2022	<ul style="list-style-type: none"> • Target Date to distribute Results Review & Plans to Trustees and Assistant Superintendents
Nov 16-22, 2022	<ul style="list-style-type: none"> • School Results Reviews
November 21-22, 2022	<ul style="list-style-type: none"> • Central Results Reviews