

# Austin Independent School District

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March 12, 2009

TO: Board of Trustees

THROUGH: Dr. Pat Forgione  
Superintendent

FROM: Steve West  
Interim Chief Financial Officer

SUBJECT: Annual Budget Process

There are many moving parts to the annual budget process. The ultimate budget requests should involve a transparent, collaborative planning effort unfolding over many months. Key to the success of a sound budget process is the establishment of **annual budget priorities**. These goals should align with the district's 2005-2010 Strategic Plan, as well as the district and campus improvement plans. The outcome of the process should maximize the effective use of limited resources and build confidence in the budget development process to reach approved priorities.

With this in mind, the attached information has been prepared for your review prior to the March 26 Board meeting. Four documents outlined below will guide the Board of Trustees' discussion on establishing budget priorities for the 2009-2010 fiscal year.

1. Strategic Plan Goals and Board Budget Priorities
2. Board Budget Priorities
3. 2009-2010 Budget Process Overview
4. 2010-2011 Budget Process Overview

The Board Budget Priorities as shown in these pages are intended as a guide for Board discussions. They are intended to be broad in scope and to show the link between the District's Strategic Plan and annual budget goals. They were assimilated to align as closely as possible with Strategic Plan Goals for 2005-2010 and the draft of the 2009-2010 District Improvement Plan (under preparation by the District Advisory Council). During the meeting, we anticipate that these "talking points" will be refined and adjusted to reflect the Board of Trustees' 2009-2010 Budget Priorities.

### **Strategic Plan Goals and Board Budget Priorities**

This page is separated into two columns – 1) the Board-endorsed Strategic Plan Goals for 2005-2010 and 2) the Board Budget Priorities for 2009-2010. The listed budget priorities are “talking points” to guide the Board’s discussion and ultimate approval.

### **Board Budget Priorities**

This sheet will be used as a future communication tool for budget discussions. It begins with the Board’s approved budget priorities. The second column will reflect the Performance Objectives established by the District Improvement Plan, the Citizens Budget Review Committee and other stakeholders. Some examples are shown in this worksheet. The third column will ultimately show specific Strategies for accomplishing the Board’s priorities and performance objectives. These are the specific requests for use of funds that are gathered during the budget process. The final column is the Options Evaluation Column. This column will be useful when more than one option exists for accomplishing a specific strategy.

### **2009-2010 Budget Process Overview**

This sheet depicts the proposed 2009-2010 budget process activities, highlighting key participants and actions within a compressed timeline. Ideally, the budget process would encompass an entire year of planning.

### **2010-2011 Budget Process Overview**

This sheet represents a proposed planning budget process cycle for years starting 2010-2011 and beyond. This schedule is designed to give ample time for all stakeholders to vet budget related discussions.

We look forward to discussing the above information with the Board on March 26. Any questions that you may have prior to that meeting would certainly be appreciated.

SW/dls

Attachments