
MID-YEAR REVIEW/BUDGET DEVELOPMENT (BUD-P012)

Sacramento City Unified School District

1.0 SCOPE:

- 1.1 The process that is used for Mid-Year Review and Budget Development for the Sacramento City Unified School District.

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

2.0 RESPONSIBILITY:

- 2.1 Fund Specialists

3.0 APPROVAL AUTHORITY:

- 3.1 Director of Budget


Signature

3/31/08
Date

4.0 DEFINITIONS:

- 4.1 SCTA – Sacramento City Teachers Association (Certificated).
4.2 SEIU – Service Employee International Union (Classified).
4.3 HRS—Human Resource Services.
4.4 ESCAPE—Software program used to maintain and hold all of the transactions made on all district employees' employment records.

5.0 PROCEDURE:

- 5.1 Budget Services sends out budget development packets to site administrators and Associate Superintendents to review personnel and budget issues for next year. Union contracts may be referenced such as SEIU and SCTA.
- 5.1.1 By using the following reports generated by ESCAPE:
- 5.1.1.2 Staff Changes Reports
 - 5.1.1.3 Classification Reports (elementary)
 - 5.1.1.4 Credential Reports
 - 5.1.1.5 Position Authorization Reports
 - 5.1.1.6 Personnel Verification Reports
- 5.2 Identify any personnel and/or budget issues the site administrator may be experiencing.
- 5.3 Review actual enrollment and future enrollment projections.
- 5.4 Identify future staffing needs for certificated and classified employees.
- 5.5 Identify classified employee layoffs.
- 5.6 Identify certificated surplussing for following year.
- 5.7 Review misassignments for certificated staff.
- 5.8 Review budget needs and develop future year budgets.

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6.0 ASSOCIATED DOCUMENTS:

- 6.1 Staff Change Reports (generated from Escape)
- 6.2 Classification Reports (elementary) (generated from Escape)
- 6.3 Credential Reports (generated from Escape)
- 6.4 Position Authorization Reports (generated from Escape)
- 6.5 Personnel Verification Reports (generated from Escape)
- 6.6 Budget Reports

7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
Position Control Reports	Binders and file cabinets in HRS office.	2 years	Discard as desired.	Secured area by Personnel Analyst.
Budget Reports	Files in Budget Office	2 years		Secured area by Budget staff.

8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
12/30/06	A	Initial Release
3/31/08	B	Revised Section 1.1, 5.1 & 7.0

***** End of procedure *****