

HOUSTON INDEPENDENT SCHOOL DISTRICT

Instructions

Budget Planner Tool and Staffing Ratio Analysis

Date: 03/24/2017

*Presenter: Budgeting and Financial Planning
George Perez– Sr. Manager*



School Budget Planner Instructions

School Budget Planner Tool (Instructions)

1. Type the school name in cell “A3”.
2. Please note there are five expenditure category sections.
 1. Non-Salary Payroll
 2. Contracted Services
 3. Supplies and Materials
 4. Other Operating Expenses
 5. Capital
3. Referencing the current Budget Report, select or type the commitment item and fund code under the appropriate expenditure category.
4. Referencing the Budgets Online data, type the Budgeted Expense located in the Preliminary Budget that was established.

School Budget Planner Instructions (Cont'd)

School Budget Planner Tool (Instructions)

5. Type the Actual Expense located on the current Budget Report.
6. View the results.
 - Projected Annual Expenses
 - Projected Annual Budget Balance
 - Recommended Action
 - Fund Summary – Projected Annual Budget Balance
 - Total Summary in the top section

Staffing Ratio Instructions

Staffing Ratio Analysis (Instructions)

1. Begin by obtaining the campus roster of teachers by grade level taught and campus enrollment figures.
2. Then run the Authorized Position Report for the Admin Staff at the campus.
3. Access the Staffing Ratio Template
4. Input only in the gray cells

Staffing Ratio Instructions (Cont'd)

Staffing Ratio Analysis (Instructions)

5. Select the drop down list for Periods Taught.
6. Type the enrollment for each grade level.
7. Type the number of teachers serving each grade level in the FTE Allotment for CY and compare to the Estimated FTE Allotment.
8. Under the campus-applied enrollment range, type the number of staff in the Administrative Staffing Levels section and compare to the Recommended Admin.

Thank you

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