

# Morrisville Budget Planning Calendar FY2012

Updated 4-20-11

	No	Calendar	Subject	Mechanism	Target Audience	Objective
<b>Assessment</b>	1	October 12 6:30pm Town Hall	Comprehensive Annual Financial Report	• Briefing Presentation	Town Council Public Budget Panel Staff	• Receive & accept Independent Auditor's results of June 30, 2009
	2	October	Performance Measures Report FY2010	• Summary Report	Town Council Public Budget Panel Staff	• Transparency of Government • Provide Performance Measures Report FY2010 to assess service delivery by celebrating successes and identifying weaknesses to plan improvements
	3	October 12	CIP Weighted Criteria	• Briefing Meeting	Town Council Staff	• Create an adopted set of formal weighted criteria for Staff to use in prioritizing CIP Projects during Budget Process
	4	October 26	CIP Weighted Criteria	• Business Meeting	Town Council Staff	• Adopt a set of formal weighted criteria for Staff to use in prioritizing CIP Projects
	5	December	Post Audit LRFM Summary Report	• Summary Report	Town Council Public Staff	• Provide Long Range Financial Model Post Audit Summary to Council in preparation for FY2012 budget development discussions to determine future capacity
<b>Focus</b>	6	January 29-30 Cedar Fork Community Center	FY2012 Budget Development	• Retreat	Town Council Staff	• Council/Staff review priorities of community in relation to Town's financial capacity to deliver on goals & initiatives short-term/long-term • Staff receives high level guidance from Council for Strategic Budget Development by discussing position of LRFM Post Audit, economic influences, current CIP listing, service levels for the future, workforce needs, deferred items
	8	February 1	Budget Portal Open	• Budget Portal Open via Website	Public	• Open Budget Portal for community input as Council discusses and directs budget planning efforts • Collect public comments and forward to Council for consideration as they direct budget planning efforts
	9	Postponed until Apr-May	Community Needs Survey - CIP	• Survey	Citizen Survey Panel Group	• Collect community input on projects to qualify for community support criterion category on the CIP Weighted Prioritization Criterion • NOTE: The Town is currently working to develop a more defined CIP Process and as such, this step would normally take place in the Assessment Phase.
<b>Assembly</b>	10	March 1 Cont'd March 8 Cont'd March 17	CIP, Non-Capital Spending & Workforce Benefits Package FY2012 Budget Development	• Workshop	Town Council Staff	• Council and staff program workforce benefit package and Non-capital spending based on available capacity • To assess prioritization of Capital Improvements Plan and Council provide guidance • Any other items outstanding from RETREAT

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	11	March - April	FY 2012 Budget Preparation	<ul style="list-style-type: none"> <li>Internal Coordination</li> </ul>	Staff	<ul style="list-style-type: none"> <li>Staff prepares recommended FY2012 Budget Report inclusive of LRFM, CIP and Performance Measures</li> </ul>
	11	April 26	Proposed FY 2012 Annual Operating Budget At – A – Glance Mailer	<ul style="list-style-type: none"> <li>Informational Mailer</li> <li>Newsletter</li> <li>Website</li> </ul>	Public Media	<ul style="list-style-type: none"> <li>An informational Preliminary Budget-At-A-Glance brochure created to inform the public of Council's upcoming consideration of FY 2012 Annual Operating Budget</li> <li>Brochure will serve as Town-wide notification of Open House and Public Hearing opportunities</li> </ul>
Presentation	12	May 10 5pm Virtual Online Open House Posted Staff briefs Council	Presentation of FY2012 Budget as developed by the LRFM & CIP posted online	<ul style="list-style-type: none"> <li>Informational Online Virtual Open House</li> <li>Briefing</li> </ul>	Public Budget Panel Town Council Media	<ul style="list-style-type: none"> <li>Informational Virtual Open House facilitates opportunity for public to receive information and ask questions regarding departmental operating budgets</li> <li>Online materials will be posted by 5PM on May 10<sup>th</sup> and remain posted until budget is adopted</li> <li>1<sup>st</sup> Brief on FY 2012 Annual Operating Budget recommendation with 5-Year LRFM and 5-Year CIP</li> <li>Council discuss proposed budget to clarify any recommended changes</li> </ul>
	13	May 24	Public Hearing FY2012 Budget	<ul style="list-style-type: none"> <li>Public Hearing</li> </ul>	Public Town Council Media	<ul style="list-style-type: none"> <li>Public hearing is held to receive input from the public on the FY 2012 Annual Operating Budget , 5-Year LRFM and 5-Year CIP proposed to Council</li> </ul>
	14	June 14	FY 2012 Budget Public Hearing Continued from May 26th	<ul style="list-style-type: none"> <li>Briefing</li> </ul>	Town Council Public Staff	<ul style="list-style-type: none"> <li>2<sup>nd</sup> Brief of FY 2012 Annual Operating Budget recommendation and LRFM/CIP Summary Report</li> <li>Continued Public Hearing</li> <li>Council presents final adjustments so staff can prepare final document for adoption on June 22<sup>nd</sup></li> </ul>
	15	June 28	Adoption FY 2012 Annual Operating Budget	<ul style="list-style-type: none"> <li>Business Meeting</li> </ul>	Town Council Public Staff	<ul style="list-style-type: none"> <li>Adoption FY 2012 Annual Operating Budget and LRFM/CIP Summary Report</li> <li>Council adopts FY 2012 Annual Operating Budget and Final LRFP/CIP Summary Report</li> </ul>
Implementation	16	July	FY 2012 Annual Operating Budget Report inclusive of LRFM/CIP Summary Report	<ul style="list-style-type: none"> <li>Publication Release</li> </ul>	Public Budget Panel Town Council Media Staff	<ul style="list-style-type: none"> <li>Comprehensive FY2012 Budget Report published providing a greater level of detail in the following areas: <ul style="list-style-type: none"> <li>- How the budget was created</li> <li>- What factors influenced the budget</li> <li>- How the budget will be executed</li> <li>- What the departmental goals and initiatives are for the budget performance</li> <li>- What policies the budget will be held to for greater accountability</li> <li>- And much more..</li> </ul> </li> </ul>
	17	July 1- concurrent	FY 2011 Annual Operating Budget Performance		Budget Panel	<ul style="list-style-type: none"> <li>Begins evaluating Quarterly budget performance against the adopted FY2012 Budget</li> </ul>

Budget Calendar remains flexible to change as Council deems necessary.