

Morrisville Budget Planning Calendar FY2013

Updated 10/27/11

	Calendar	Subject	Mechanism	Target Audience	Objective
Assessment	October 25	Comprehensive Annual Financial Report FY2011	• Briefing Meeting Presentation	Town Council Public Budget Panel Staff	• Receive & accept Independent Auditor's results of June 30, 2011
	October 31	Performance Management Report FY2011	• Report	Town Council Public Budget Panel Staff	• Transparency of Government • Provide Performance Measures Report FY2011 to assess service delivery by celebrating successes and identifying weaknesses to plan improvements
	November	CIP Survey	• Survey	Citizen Survey Panel Group	• Collect community input on projects to qualify for community support criterion category on the CIP Weighted Prioritization Criterion
	November 16	Town Strategy – Pre Retreat	• Internal Meeting	Town Manager Senior Directorates Budget Office	• Senior Directors meet with Town Manager to assess performance, develop direction to budget development in terms of priorities and plan objectives to accomplish at Retreat.
Focus	November 17 – 22	Round One Senior Directorate Guidance	• Internal Meeting	Department Heads and Key Staff	• Based on Town Strategy Meeting Senior Directors meet with their groups to facilitate guidance for Round One Budget Planning prior to Retreat
	November 23 – December 16	Round One Pre-Retreat Budget Planning	• LRFM	Department Heads Key Staff Budget Office	• Staff begins Round One Pre-Retreat Budget Planning activities. This pre-planning will help produce an early assessment of challenges and opportunities to work through during retreat in determining short & long term priorities.
	January 3 – 21	Revenue Forecasting	• LRFM	Budget Office Key Departments	• Budget Office coordinates with departments in developing early revenue projections
	January 28 – 29 TBA	Budget Priorities Short & Long Term	• Retreat	Town Council Staff	• Council/Staff review priorities of community in relation to Town's financial capacity to deliver short-term/long-term Goals with high level guidance (post audit, economic influences, current CIP listing, future service levels, workforce needs, deferred items)
	February 1	Budget Portal Open	• Budget Portal Website	Public Feedback	• 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
Assembly	February 2	Town Strategy – Post Retreat	• Internal Meeting	Town Manager Senior Directorates Budget Office	• Senior Directors meet with Town Manager to assess performance, develop direction to budget development in terms of priorities and plan objectives to accomplish at Retreat.
	February 6 – 11	Round Two Senior Directorate Guidance	• Internal Meeting	Department Heads and Key Staff	• Based on Town Strategy Post Retreat Meeting Senior Directors meet with their groups to facilitate guidance for Round Two Budget Planning to finalize budget.
	February 13 – 28	Round Two Post-Retreat Budget Planning	• LRFM	Department Heads Key Staff Budget Office	• Staff begin Round Two Post-Retreat Budget Planning activities. This post-planning will adapt to Council guidance and finalize budget planning activities
	March 6	CIP, Funded/Non-Funded Priorities, Workforce Benefits	• Workshop	Town Council Staff	• Council and staff program workforce benefit package, review projected Funded and Non-Funded priorities & CIP in comparison to available capacity. • Any other items outstanding from RETREAT

	Calendar	Subject	Mechanism	Target Audience	Objective
	March - April	FY 2013 Budget Report Development	<ul style="list-style-type: none"> Internal Coordination 	Budget Office Staff	<ul style="list-style-type: none"> Staff prepares recommended FY2013 Budget Report inclusive of LRFM, CIP and Performance Measures
Presentation	April 27	FY 2013 Budget At – A –Glance	<ul style="list-style-type: none"> Next Week Email Blast Website 	Public Media	<ul style="list-style-type: none"> An informational Budget-At-A-Glance advisory created to inform the public of Council's upcoming consideration of recommended FY 2013 Annual Operating Budget
	May 8 5pm Virtual Online Open House Posted Staff briefs Council	1 st Briefing FY2013 Recommended Annual Operating Budget & 5-Year CIP Virtual Open House	<ul style="list-style-type: none"> Informational Online Virtual Open House Briefing Meeting 	Public Town Council Media	<ul style="list-style-type: none"> Informational Virtual Open House facilitates opportunity for public to receive information and ask questions regarding departmental operating budgets Online materials will be posted by 5PM on May 8th and remain posted until budget is adopted 1st Brief on FY 2013 Annual Operating Budget recommendation & 5-Year CIP Council discuss proposed budget to clarify any recommended changes
	May 22	Public Hearing FY2013 Budget & 5-Year CIP	<ul style="list-style-type: none"> Public Hearing 	Public Town Council Media	<ul style="list-style-type: none"> Public hearing is held to receive input from the public on the FY 2013 Annual Operating Budget and 5-Year CIP proposed to Council
	June 12	Second Briefing of FY2013 Annual Operating Budget & 5-Year CIP	<ul style="list-style-type: none"> Briefing Meeting 	Public Town Council Media	<ul style="list-style-type: none"> Council discuss proposed budget to clarify any final recommended changes
	June 26	Adoption FY 2013 Annual Operating Budget & 5-Year CIP	<ul style="list-style-type: none"> Business Meeting 	Town Council Public Staff	<ul style="list-style-type: none"> Adoption FY 2013 Annual Operating Budget and 5-Year CIP
Implementation	July	FY 2013 Annual Operating Budget Report inclusive of LRFM/CIP Summary Report	<ul style="list-style-type: none"> Publication Release 	Public Budget Panel Town Council Media Staff	<ul style="list-style-type: none"> Comprehensive FY2013 Budget Report published providing a greater level of detail in the following areas:
	July 1- concurrent	FY 2013 Annual Operating Budget Performance	<ul style="list-style-type: none"> Quarterly Review Meetings 	Budget Panel	<ul style="list-style-type: none"> Evaluate Quarterly budget performance against the adopted FY2013 Budget

Budget Calendar remains flexible to change as Council & Staff deems necessary. Only meeting dates with Council are required to be adopted to comply with Open Meetings Law.