



September 1, 2017

TO: Budget Committee Applicants

FROM: Monica Brown, Chief Financial Officer and Director of Support Services

RE: Budget Committee Roles and Responsibilities

As we begin the planning stage for the 2018-19 budget development process, we feel it is important to review the roles and responsibilities of a Budget Committee Member. The following information summarizes guidance outlined in Oregon Revised Statute and from the Oregon Department of Revenue. Additional details are available in a PowerPoint presentation:

**What is a budget committee and what are the main duties?**

1. A budget committee is established by each local government subject to Local Budget Law (ORS 294).
2. The budget committee shall consist of the members of the governing body and an equal number of qualified electors. In the case of Eugene 4J, seven (7) members.
3. Any deliberation on the proposed budget must take place at a properly advertised public meeting.
4. The purpose of the budget committee is to receive the budget message from the superintendent, review the proposed budget, listen to comments from citizens, and approve the budget.

The budget committee reviews the proposal to ensure that the district is planning to spend money in furtherance of expressly stated district goals. Upon completion of its deliberations, the budget committee approves the budget and formally sets the tax rate.

**2. What can the budget committee discuss before the superintendent's budget message and the presentation of the proposed budget?**

The budget committee may meet from time to time throughout the year at the governing body's discretion. All of these meetings are open to the public and notice of the meeting must be given in the same manner as notice for meetings of the governing body. The budget committee may meet for the purposes of:

- Receiving training on the budget committee process, calendar, expectations for committee members, etc.
- Discussing committee members' preferences for ground rules, rules of order, conduct of meetings, method of voting / reaching consensus, etc.
- Receiving orientation on the organization and its various departments or programs and staffing, and on the activities or services provided by each.
- Receiving orientation on the format of budget document such as, the fund structure and the types of activities or programs and expenditures made from each fund in the budget document.
- Discussing the current year budget or prior year budgets, including what, in general, might be done differently next year.

**3. What shall the *not* be discussed by the budget committee before the superintendent's budget message and the presentation of the proposed budget?**

Take care not to discuss specifics of the ensuing year's budget at these informal meetings until the notice requirements for the first budget committee meeting have been satisfied. Specifics not to discuss include:

- Specific estimates of revenue, expenditures or appropriation amounts associated with any fund, object classification or line item, resource or requirement.
- The question of whether to fund specific programs or expenditures.
- The question of whether to impose any specific tax levy, or the amount of any levy.

**4. What is not included in the role of the budget committee?**

- Setting salaries, benefits, or contract terms for employees.
- Approve staffing levels.
- Decide whether a service or program should be provided.
- Establish or revise district policy

Thank you for considering service to the students and community of the district. Additional information about the Budget Committee and Oregon's Local Budget Law can be found at: <http://www.4j.lane.edu/board/budgetcommittee/>