



# tasbo

## 2023 Budget Fundamentals Allen Courtyard Marriott

### Agenda | November 13

8:45 – 9:00

Introductions and Welcome

TASBO Staff

9:00 – 10:00

#### Budget Basics I: Budget Development

We'll kick things off with budget terminology, timelines and other key things to know including: identifying local, state, and federal sources; campus and department allocations; and review of prior year budget equity/performance.

Deborah Ottmers,  
RTSBA, CPA  
Chief Financial Officer  
Ector County ISD

10:10 – 11:10

#### Budget Basics II: Compensation, Salaries & Benefits

We'll focus on the biggest part of the overall budget to include staffing; base and supplemental compensation plans, incentive programs and employee benefits plans.

Karen Wilson, CTSBO  
Policy & Research  
Associate  
TASBO

11:20 – 12:20

#### Budget Basics III: Budget Compliance

To ensure your proposed budget is in compliance, we will walk you through a budget compliance checklist and focus on mandatory spending requirements, legal requirements of adoption, notices, and the public hearing.

Deborah Ottmers

BREAK

### Lunchtime

1:20 – 2:20

#### Budget Basics IV: Budget Communication & Presentation

We will address budget communication and presentation strategies such as focusing on district goals, stakeholder priorities and long-term financial forecast.

Karen Wilson

2:30 – 3:30

#### Budget Basics V: Introduction to State Aid Funding Template I

Break down the key parts of the TEA Summary of Finance reports to include the difference between LPE, DPE, Near-Final and Final funding amounts as well as an overview of Tier I Allotments.

Deborah Ottmers

3:40 – 4:40

#### Budget Basics V: Introduction of State Aid Funding Template II

We will help you in identifying and locating the sources of information for the data tab of the template.

Karen Wilson



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