
SCHOOL DISTRICT NO. 36 (SURREY)

No. 4203.2

REGULATION: BUDGET PLANNING, APPROVAL, CONTROL AND REPORTING FOR STAFF (POSITION CONTROL)

Position Control is the procedure used by the Board and District Administration to ensure that through a systematic planning, approval, control and reporting process, every staff position required to deliver services to pupils, is supported by funding in the operating budget, targeted funds or other sources of revenue.

A “budget entitlement” is a statement that a position is duly authorized to be filled as funding is in place. Budget entitlement will be expressed as a full-time equivalent (FTE) position assigned to a specific program, function and location. A vacancy will be identified when there is a deficit between the actual staff employed and the budget entitlement for the position(s).

The elements of Position Control will be as follows:

- 1) A Staffing Entitlement Worksheet will record, by the accounting classification of expenditure (object), the total FTE positions approved by the Board in a budget year.
- 2) The approved FTE positions will be recorded in a Budget Payroll Entitlement Worksheet. This worksheet will show the estimated rate of pay per position, plus related costs such as: allowances, retroactive pay, change in status, etc. This will be the estimated base cost of the approved staff complement.
- 3) Members of Leadership Council who are designated Account Coordinators will have responsibility for ensuring that all staff assigned to a position under their responsibility, any vacancy posted, and any hiring to the position is within the approved entitlement. Account Coordinators will also be involved in the planning process that results in submissions to the Board for budget approval.
- 4) The Position Controller will have the responsibility to provide to each Account Coordinator data for every FTE position under his/her responsibility that is recorded in the Staffing Entitlement Worksheet. The data will be detailed by program, function, classification and location. The Position Controller will also designate specific accounts for each FTE position to which compensation for the staff allocated will be charged.

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- 5) The information included on the Staffing Entitlement Worksheet will be entered in the Human Resources Information System (HRIS) and applied by Human Resources in verifying that all staff assigned to a position and every request to post or advertise a vacancy is supported by the appropriate FTE position entitlement.
- 6) If a member of Leadership Council desires a reallocation in the approved FTE positions - within an object, a recommendation will be made to Executive Committee. Such a request will be reviewed by the Executive Committee in the light of the overall FTE position plan and Board direction when the operating budget was approved; and to be done with no increase in total cost.
- 7) Any request for reallocation of FTE positions which crosses the classification of expenditure (object) or varies from the direction set by the Board when the budget was approved, will require an approval from the Board.
- 8) Requests by members of Leadership Council for increases in FTE positions beyond that approved by the Board, which cannot be met through reallocations in FTE positions, must be submitted to the Board for approval following review by Executive Committee.
- 9) Each FTE manager (Account Coordinator) will be provided a status report periodically. This status report will show the budgeted FTE for each position compared to the actual FTE allocated per position.
- 10) Quarterly reports on the Staffing Entitlement Worksheet will be submitted to the Board.
- 11) Monthly reports will be provided to the Position Controller by:
 - a) Payroll, showing the actual number of FTE staff paid by account.
 - b) Human Resources, detailing for each position the actual staffing compared to the FTE position entitlement record in the HRIS.
- 12) Changes to the FTE position entitlement as a result of either Board or Executive Committee action, will be communicated through the Position Controller.

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Notes:

- A. Position Control will evolve in the District from the present partial and manual approach to a full and mostly automated procedure.
- B. This procedure is expected to be phased in during 1992/93 and be fully implemented for fiscal year 1993/94.
- C. The Position Controller shall initially be the Manager of Administrative Services and Budgets.
- D. If a budget for a TARGET ACCOUNT includes a staff component, personnel hired will be under a term specific arrangement. If the intent is to use targeted funds to create permanent positions, prior Board approval of the increase in staff complement will be required.

Approved: 1992-12-15
