

LOCAL BUDGET PREPARATION

Preparing a budget is not only about spending appropriately; it is also about group goal setting and prioritizing. The most important part of preparing a Local annual budget is the planning stage.

- Gather previous annual budgets and financial statements
- Determine where the Local was over-budget, on-budget, or under-budget and why
- Review events and important dates in the upcoming year, such as AGM, Demand Setting, educational opportunities, etc. These can be found in DMS or on the UNA calendar in Zimbra.
- Review possible expenses for those events (such as ratification votes)
- Review Local Bylaws, if applicable, for Local funding guidelines
- Review Funding policies
- Obtain input about what they need from the budget to carry out their primary responsibility of administering the Collective Agreement from the following groups:
 - Local Executive members
 - PRC Committee members
 - OH&S Committee members
 - Unit/Office Representatives
- Meet with the Local Executive (include committees and Unit/Office Representatives, if possible) to:
 - Give an overview of last year's budget and spending
 - Set the Local's priorities for the next year (such as membership engagement initiatives, Nurses' Week, funding to events or meetings, etc)
 - Outline funding needs for Local priorities
 - Allocate duties and outline funding needs
 - Determine what large expenditures the Local should plan for
 - Decide on funding for any upcoming events
 - Review the current distribution of Local funding and determine what changes should be made

Important Dates

Fiscal Year – January 1st to December 31st

Local Annual General Meeting – by December 31st of each year

Submission of approved Local Annual Budget – by January 31st of each year

If the Local does not submit an approved annual budget by the final cut-off date of February 28th, Local funding will not continue. Locals who are unable to meet that deadline should notify UNA's Secretary Treasurer.