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Understanding the budget process

Few reports are more important — or drier to read and more difficult to understand — than your district’s budget document. Page after page of numbers, usually with little explanation about what they represent. And typically, there’s little context for how the budget was developed and why different programs or line items were funded.

That’s why it’s important that districts “uncomplicate” the process as much as possible, so patrons don’t have to be accountants or bankers to understand it.

Link the numbers to the “real world”

A good first step is to simplify the budget document by using straight-forward language and eliminating the jargon that only educators are familiar with. Include a short summary at the start of each section, with explanations about how different budget items relate to student learning and success. For example, if there is a beefed-up investment in technology, include an explanation of what that means. Will it provide more computers so that every child has access to a device? Will it speed up connection rates so that all students can work on state testing on the same day, rather than staggered schedules?

Or how about the new math curriculum that is in the budget? Include a short explanation about what that means. Will every student now have access to their own book to take home?

If there are cuts to a particular program or area, outline how that will impact students. Will you have to eliminate any classes? Will there still be educational assistants in the classrooms?

Engage the community in setting funding priorities

The money in school budgets comes from tax revenues, so community members naturally are interested in how their tax dollars are being spent. The budget process should offer patrons an opportunity to engage in the conversation and offer feedback, both in written form and at public forums and meetings.

Engage your community early, before a proposed budget is presented to the Budget Committee. That way, they can help you determine the funding priorities for the new budget.

Look for ways to simplify what can be a very complicated process. Instead of having patrons grapple with multi-million dollar figures in setting priorities, some districts have had success using a \$100 budget. Here’s how it worked for one Oregon school district that was facing budget cuts:

The district symbolically reduced their entire budget to \$100 and created a worksheet showing how much of that amount went for different categories. For instance, it might cost

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For content questions, contact: Marcia Latta Communications Consultant (503) 580-2612.

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\$16.46 for elementary teachers, 45 cents for K-12 textbooks and \$12.82 to operate special education programs. Participants were each given worksheets, and then they huddled in small groups to make decisions on allocating the funds. It was an eye-opening process for many as they struggled to prioritize the programs and expenditures that were most important to them. The administration used their responses to develop spending priorities.

In Washington, districts have used a similar process with “The Budget Game,” a board game that uses poker chips or play money to help participants see the relationships in district expenditures.

Online surveys are another good tool for explaining details of the budget process and enlisting feedback. There are many free and/or low-cost survey tools available, including Google and Survey Monkey. Questions can be asked in a number of ways, from simple yes and no queries to ranking funding options in priority order. Respondents can also be given an opportunity to offer comments.

Be open and transparent

There’s a lot of planning and estimation that goes into school budgets and often a lot of uncertainty. School districts are required by law to pass a budget by June 30 each year, and sometimes they don’t know their allocation from the state before they have to pass their budget. It’s important to help patrons understand that and the other constraints districts face when crafting budgets for the following years.

A few key steps in creating an open and transparent process:

- Publish a timeline that lists the dates and times for all budget meetings. Inform all key publics (parents, school staff, community members, etc.) about the budget timeline and encourage them to participate in meetings.
- Provide background information so that participants understand the budget cycle and the parameters districts face in preparing their budgets.
- Be sure to show how spending aligns with the district’s strategic goals and directions.
- Communicate frequently throughout the budget process. Post to your website and send electronic updates immediately after each budget meeting, recapping the discussion and any decisions that were made.
- Keep your staff well-informed about the budget process and decisions. That shows respect to your employees, and it equips them with accurate, up-to-date information to share with parents and community members.

Although everyone’s priorities won’t be met in the final budget, patrons appreciate the opportunity to be involved in the process and have their voices heard.

Contributed by Connie Potter, communications consultant