

# Best Practices for Engaging Stakeholders in the Budget

A BRIEF GUIDE FOR CALIFORNIA SCHOOL AND DISTRICT LEADERS



With the implementation of the Local Control Funding Formula, it is more important than ever that California public school districts develop authentic engagement practices with their parents, students, educators, and community members in order to develop meaningful Local Control and Accountability Plans (LCAPs). One key component of engaging stakeholders productively is providing important budget information in an easily digestible manner. This guide will help school and district leaders provide the budget information necessary to establish and maintain effective, strong partnerships with parents, students, and community leaders in order to better serve all students.



## STEP 1:

### DETERMINE WHAT BUDGET INFORMATION YOUR SCHOOL DISTRICT SHOULD SHARE WITH YOUR COMMUNITY

#### Overall District Financial Resources

Tell stakeholders how much revenue the district receives, the primary sources of this revenue, and how much comes from each source. Help stakeholders understand the broader context of district budgeting by explaining any major trends in revenue patterns that might affect the district's spending plan. For example, perhaps rising pension costs will affect the district's available resources. Or, maybe new tax revenues will create new spending opportunities.

#### Major Initiatives

Inform parents and community stakeholders about the rationale behind your district's major proposed expenditures. Districts should share what their primary investments are, how much each of these major initiatives will cost, and how stakeholders will see the impact of these expenditures at the district and school levels. Informed community members will help your district have the buy-in necessary to support these efforts to close the achievement gap and improve services for students.

#### District's Needs vs. Wants

Provide parents, students, and other stakeholders with realistic information regarding your districts' fiscal health and investment needs, early and often. Explain to stakeholders their opportunities to shape future educational investments for their students.

#### Connect the Dots Between Student Achievement and School Spending

Provide your stakeholders with the district's overall vision on how the district's annual budget, strategic priorities, and instructional priorities will improve student achievement.





## STEP 2:

# USE THESE EFFECTIVE PRACTICES TO PRESENT BUDGET INFORMATION TO STAKEHOLDERS

### Keep It Local

Where possible, show how budgeting decisions and expenditures will affect school sites. Localized information helps students, parents, teachers, and other community members understand how budget decisions will affect them most directly.

### Be Specific and Relevant

Help stakeholders see how budget decisions are relevant to their concerns by being as specific as possible with line items about programs and services. For example, instead of reporting a general line item like “school climate,” explain that the spending goes toward implementing Restorative Justice at 5 school sites by hiring a restorative justice trainer that will train 40 teachers in alternative discipline practices.

### Be Concise

To make budget information easily digestible, limit handouts to two to three pages and limit presentations to a manageable number slides.

### Simplify Budget Data

Package financial information in a way that community members will understand. One way to do this is to express expenditures in “unit costs.” For example, instead of saying that the district spends \$4.5 million on instructional aids, say that the district provides instructional aids to 750 students with special needs, at a cost of \$6,000 per students.

### Use Easy-to-Understand Language

Translate jargon and acronyms into plain language. Avoid using accounting codes, which most members of the public will not be familiar with.

### Be Visual

Use infographics, charts, diagrams, and colors.

### Communicate Broadly and Often

Share this information in a variety of forums including school site council meetings, parent committee meetings, community LCAP forums, school board meetings, PTA newsletters, school site bulletin boards, school events, and the district website.

