The budget process: 
Getting the community involved in creating your budget

What are the most important services your schools provide?

- Helping students succeed in college and careers?
- Linking the “real world” to staff and students?
- Teaching children to read and understand mathematics?
- Helping kids learn to make good, lifelong decisions about their health and safety?
- What about introducing children to technology?
- Or in some cases, providing the only caring guidance and healthy meals kids can count on each day?

Setting priorities on essential school services – and maintaining those priorities in the chaos of funding shortfalls – is critical in your school district’s budget process. Involving the community is crucial.

Here’s how to make your budget process as open, efficient and accountable as possible in your community:

Develop a process that allows everyone a chance to be heard before important decisions are made.

- Develop a Key Communicator Network and use it to make sure that local opinion leaders – from civic leaders and parent activists to business leaders – understand the budget process. (Check out OSBA’s Web site for ideas on creating your Network.)
- Develop a timeline of the budget process and inform all key publics (parents, school staff, community members) about the timeline.
- Begin discussions at the local school level and involve key publics in ongoing budget discussions.
- Focus on two-way, face-to-face communication. Open forums and informal, welcoming public meetings work best. Do away with the podium and formal “us-against-them” atmosphere. (For how to run an effective open forum, see “Try an Open Forum,” page 2.)
- Provide opportunities for people to offer written opinions as well as verbal comment. This can mean providing a table, chair and suggestion box at a public forum, or using an online survey on the district’s Web site. (More about online surveys on page 4.)
Develop budget documents that personalize programs and are easy to understand.

- Make a complicated budget process more understandable by using some “people friendly” strategies. (See page 3.)
- Be sure to show how spending at the district level aligns with the district’s strategic goals and directions.
- Translate budget documents into other languages to meet the needs of parents.
- Explain how threatened program reductions and cuts will impact students in local schools.
- Encourage community members to visit schools to see programs and accomplishments first-hand.
- Clearly explain how and why you “reserve” and carry-over funds to prepare for uncertain events, such as a drop in enrollment, legislative changes and revenue forecasts. Use common examples from personal budgets like buying homes and saving for future purchases.

Try an Open Forum

An open forum is a friendly, informal way to provide information and gather public comment about the budget.

With no printed agenda, no assigned seating, and no formal discussions or presentations, an open forum offers many opportunities for questions and answers.

Characteristics:

- Information is presented “buffet style” and includes charts, graphics and other visuals that explain the budget process.
- Because there is no fixed agenda, people can come and go at their convenience.
- School staff members are available to answer questions and provide information, but they do not make formal presentations.
- Written informational materials are available.
- People can submit their comments in writing, and those comments are forwarded to decision-makers.
- Participants can speak directly to decision-makers if they do not want to go on the record.
- Transcripts of comments are made available after the forum.

Who participates?

- Community members, parents, students and staff are invited to participate.
- School board members, budget committee members and selected school staff are available to listen to comments and answer questions.

Why are open forums successful?

- Open forums are an effective way to exchange ideas and information before decision-making.
- Open forums encourage informal, casual and friendly discussion. Participation time is short, and the informal atmosphere encourages participation by people who may be intimidated by formal meetings.
- Participants have direct interaction with staff and decision-makers that otherwise might not be available.
- Forums offer many opportunities for questions and detailed answers.
- The focus is on ISSUES rather than positions – which helps people consider strategies to create solutions.

(For more information on conducting an open forum, check out resources on page 4.)
Make school staff a priority in budget discussions and all district communications.

- All staff members, including teachers, custodians, cooks, secretaries and bus drivers, are key communicators. (Research shows that some 90 percent of all the information people receive about schools comes from school staff.) Arm your staff with current, reliable information.

- Use printed and electronic newsletters, and make sure they arrive immediately after board meetings and key budget discussions.

- Although everyone’s priorities won’t be met when final budget decisions are made, just being involved in the process provides many people with the outlet they need to accept final decisions.

- Involving the community in the budget process is another opportunity to reinforce your basic mission: helping students learn and reach their full potential.

People–friendly strategies make playing the budget game easier.

School districts use many ways to make a complicated budget more understandable. Here are some ideas that have proven successful:

**Start with a $100 budget**

Use $100 to symbolize the total school district budget to get community budget discussions rolling. The amount is easier for people to understand than wrestling with dollars in the millions.

Forest Grove School District provided an easy dollars-and-cents picture of their 1998-99 budget in this way. For example, in a $100 budget, it cost $16.46 to pay for elementary teachers, 45 cents for K-12 textbooks, and $12.82 to operate special education programs.

During the budget process, people were asked to allocate funds and make cuts from the $100 budget. The administration used their responses to develop spending priorities.

(For more information about Forest Grove’s budget process, call Connie Potter, the district’s public information director, at 503-641-8833.)

**Play the budget board game**

Washington state school districts developed “The Budget Game” – a board game that uses poker chips, or play money to help participants see the relationships in district expenditures.

Budget categories are represented on the game board divided into: Teaching, Teaching Support, School Administration, Central Administration, Other Support Activities, Fund Balance and School Construction Fund.

Participants are divided into groups at tables set with a game board, poker chips (or play money) and a budget information sheet. Participants construct the district budget with the poker chips, stacking chips on the board according to the budget information given. Poker chips are removed to show budget cuts, or reallocated to different categories, as participants work at the budgeting process.

The board game is a simple, visual way to look at how a district spends its money – and to see how few discretionary dollars districts actually have.

(For detailed information on The Budget Game, check the School Funding Toolkit on OSBA’s Web site: www.osba.org.)
Use an online survey

Online surveys are an efficient way to explain details of the budget process and enlist public comment on setting budget priorities and making budget cuts.

The Newberg School District used an online survey from a company called Zoomerang to list proposed budget reductions and brief explanations of the reductions.

For example, the survey listed: “Eliminate Middle School Athletics ($71,000) (100% of Middle School Athletics). This reduction represents the entire middle school athletic budget.” That item generated some 84 online responses, ranging from “Please do not eliminate…athletics are the dream, outlet, and character-builder for many students,” to “The classroom must be given priority.” Respondents were asked to comment on more than a dozen proposed reductions, and to recommend which items on the reduction list they would add back if funding allowed. General comments also were solicited.

(For more information on using an online survey, call OSBA Communication Services at 1-800-578-6722.)

Additional resources for involving your community in the budgeting process

OSBA’s School Funding Toolkit:
www.osba.org/hotopics/funding/toolkit/index.htm
• Budget Simulation Game
• K-12 Spending and the Oregon Economy
• Comprehensive Analysis of K-12 Education Finance in Oregon
• Oregon’s Quality Education Model

OSBA’s Education Funding: At the Crossroads
www.osba.org/hotopics/funding/crossroad/index.htm
• Will the Well-Educated Child Become an Endangered Species in Oregon?
• History of school funding in Oregon
• The Last Word: A Call to Action

OSBA’s Community Relations Web page:
• Key Communicator Network: Building Support for Your Schools
• Communicating with Diverse Populations
• Building Meaningful Partnerships
• Building Collaborative Relationships
• School Funding Crisis: Communicating About the Shortfall
• Peaceful, Productive Public Meetings