

**Quarterly Review and Updates to Plan: Budget Accessibility**

<p align="center"><b>S</b></p>	<p><b>STUDY:</b> To be completed quarterly and at end of school year</p>	
<p><b>Summarize Data to Date</b></p>	<p>Data has been collected via the strategic planning process, including surveys of parents, employees, and community members, about satisfaction with the district’s outreach and communication efforts around budgeting. Data indicated that while many community members are satisfied with current outreach efforts, the finance department can clearly do more to address the concerns of approximately one quarter of respondents who indicated that more outreach efforts were necessary. Some issues raised:</p> <ul style="list-style-type: none"> <li>● Some respondents were not aware that an executive summary of the district’s budget was produced.</li> <li>● Some respondents were not satisfied with the quality of the department’s public hearings.</li> <li>● Many respondents indicated that they were interested in receiving budget information using online tools and, particularly, online tools accessed through mobile-friendly applications.</li> </ul> <p>Our data shows initial progress toward strategic planning goals. The Office of Finance has identified objectives for implementation of both budget outreach efforts and student engagement that will continue in the coming quarter.</p> <p>The department has learned that our original timeline for holding focus groups and completing surveys was insufficient. We will be extending the focus group and survey work until the end of quarter two. The department is currently working on planning logistics of focus groups, such as topics to be discussed, determining representative samples of participants, and finalizing dates, locations, and schedules.</p>	
<p><b>Color Coding</b></p>	<p><b>On your action plan, color code the steps that you planned for this past quarter: (3)</b>  <b>Green – Action step completed (1)</b>  <b>Yellow – Action step in progress (2)</b>  <b>Red – Action step was not started as planned (0)</b></p>	
<p align="center"><b>Analyze how this data gives evidence to your progress on the plan (refer to the measures you listed).</b></p> <p>Meetings took place with the department of College and Career Readiness regarding the engagement of students in the district/school budget process. The plan is to create an alternative internship experience for students to help enhance budget communication and outreach. Through this alternative internship experience, students will solve real business problems with the help of professionals within a simulated business environment in their classroom. Beside helping with the district address the need to enhance budget communication and outreach, it will provide students with an opportunity to practice problem solving, applying creative thinking, working together in teams and practicing communication skills.</p>	<p align="center"><b>Analyze the data that gives evidence to lack of progress toward the plan (refer to the measures you listed).</b></p> <p>Initial activities are promising; however, selection of a vendor for a budget visualization tool has been slower than anticipated. The department has participated in vendor demonstrations and has selected a vendor who is uniquely experienced in conducting online budget-related outreach for other local government jurisdictions. The purchase order for subscription for the online tool is being released.</p> <p>Initial planning of focus groups has begun, but the completion of this action step needs to be extended beyond October.</p>	

Vendor demonstrations were used to help identify a provider for online budget-related outreach.

**A**

**ACT: Revise or continue with implementation based on data analysis**

**What will you change about your plan for the next quarter?**

We will adjust timelines further into the next quarter to finalize retaining vendor services related to visualization platforms, and we will continue holding focus groups and distributing surveys which will help in the design of the visualization platform and receiving input into how better to inform and engage the community in the budget process.