

Quarterly Review and Updates to Budget Plan

S	STUDY: To be completed quarterly and at end of school year	
Summarize Data to Date	<p>The communications and finance teams met to create communications presentations regarding the budget. This resulted in multiple public meetings (virtual and in person) occurring to discuss the budget and coming shortfalls. Additionally, a survey was completed and data were gathered from the community about future actions needed related to the budget. A short video was created as another form of communication concerning the budget shortfall. The data indicated that almost 70% of respondents supported a referendum.</p> <p>The college and career readiness team met to discuss possible courses that could include budget activities such as understanding the school/district budget and marketing budget events. Further discussion is needed to develop these activities and create an implementation plan.</p> <p>The finance team completed the procurement of “Balancing Act,” an online budget simulation and community feedback-gathering tool. Balancing Act is an online tool meant to educate constituents about the district’s budget by providing visualizations of budget scenarios and collecting feedback from the public. The tool allows users to manipulate the interface to demonstrate their funding priorities and policy preferences as well as the impacts of those perspectives. Implementation of this tool will begin during quarter three.</p> <p>Initial meetings have occurred within the finance team to determine how best to parse the budget into workable summary-level information for the interactive budget visualization and manipulation system, including the input of district leaders.</p> <p>Numerous events occurred, and data were collected in December regarding the FY25 budget shortfalls. The data will be used to inform the Milwaukee Board of School Directors in January, when possible decisions are made about a referendum.</p>	
Color Coding	<p>On your action plan, color code the steps that you planned for this past quarter. Note the number of action steps in each category: (7)</p> <p>Green – Action step completed (2)</p> <p>Yellow – Action step in progress (3)</p> <p>Red – Action step was not started as planned (2)</p> <p>Blue – Changes for quarter three (4)</p>	
	<p>Analyze how these data give evidence to your progress on the plan (refer to the measures you listed).</p> <p>These data provide evidence of the finance team’s planning and coordination efforts, which have laid the groundwork for further progress.</p> <p>The team worked across departments to plan and implement various communications about the FY25 budget shortfall, the impact to the district, and possible solutions. The outcome of the collaboration was three</p>	<p>Analyze the data that give evidence to lack of progress toward the plan (refer to the measures you listed).</p> <p>Focus groups and surveys were delayed because of the need to dedicate time and staff toward conducting public outreach regarding the FY25 budget. These activities included determining community priorities for use of limited state revenues. This action step has been extended into April.</p>

online budget action sessions and one in-person session. This activity was very specific to this budget year but provides a process that can be replicated in future years to keep the broader community informed. Part of the process included the survey, which indicated strong participation with nearly 5,000 community members responding.

Planning meetings occurred regarding the Balancing Act tool with the vendor after purchase. This demonstrates our continued progress toward obtaining an interactive budget visualization and manipulation system. The department has also worked with the vendor to identify high-level objectives, priorities, and timelines.

As the district worked to communicate budget deficits, school and department leaders did not have sufficient information to meet with their staff and community partners. This action step has been extended into February.

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

What will you change about your plan for the next quarter?
 For next quarter, we will do the following to ensure progress:

- Have strategic planning as part of the regular standing meeting with the financial planning and budget team.
- The following action steps were extended into quarters three and four:
 - The finance team determined that the communication of the budget should be ongoing throughout the spring, so budget staff will continue to meet with communications staff to identify platforms for focused marketing to staff and community, including online presentations of the budget (e.g., videos).
 - The focus groups and survey action step will continue into quarter four, including data collected at the school level from School Engagement Councils.
 - The plan for implementing the District C project to involve students in the budget process was delayed by the vendor. We are regrouping with specific schools and the vendor to get back on track. A team will be created to review curriculum and determine opportunities to integrate information/opportunities about the school/district budgeting process into the curriculum. The Department of Financial Planning and Budget Services will meet with the Department of College and Career Readiness on a regular basis to monitor progress on the District C project. Action steps related to the development of activities and curriculum will be added to this plan as needed.
- School and department budget work will be extended now that the district has better projections for the FY25 budget.
- Staff will work with the Polco public finance experts to determine how best to parse the budget into workable summary-level information for the interactive budget visualization and manipulation system.
- The initial yearlong phase-in of Balancing Act will include consultations with public finance experts that specialize in displaying budget data to the public.