

Quarterly Review and Updates to the Budget Plan

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| S | STUDY: To be completed quarterly and at end of school year | |
| Summarize Data to Date | <p>The district has finalized the purchase of a program (Balancing Act) that will assist us with data visualization of the budget.</p> <p>School leaders conducted focus groups at the school level through each school’s School Engagement Council. Principals were required to provide the School Engagement Councils with forms as a part of their routine budget submissions to ensure that the community’s voice was heard and considered when determining school budgets. Chiefs also met with the directors of each department regarding the budget and projections for the coming year.</p> <p>We continued collecting referendum-related budget outreach data, including surveys offered to students, parents, community members, and staff. We hosted additional online informational sessions with employees and the District Advisory Council, which included information on who attended and written questions submitted by participants. In addition to providing answers to specific questions when able, we created fact sheets, PowerPoint presentations, financial forecasts, FAQs, and other marketing materials. District finance leaders responded to numerous constituent questions and media inquiries regarding the budget and the budget process with the help of the Department of Marketing and Communications and the district’s legislative policy specialist.</p> <p>https://mps.milwaukee.k12.wi.us/en/District/2024-Referendum.htm</p> | |
| Color Coding | <p>On your action plan, color code the steps that you planned for this past quarter (10):</p> <p>Green – Action step completed (4)</p> <p>Yellow – Action step in progress (4)</p> <p>Red – Action step was not started as planned (2)</p> <p>Blue – Extended timeline (4)</p> | |
| | <p>Analyze how these data give evidence to your progress on the plan.</p> <p>Throughout the budget process, leadership at schools, offices, and departments conducted outreach and listening efforts with the stakeholders in their organization. Each level of leadership solicited input and incorporated that input into their budget decisions. At the school level, this progress was recorded in schools’ School Engagement Council budget forms. These were provided by each school and will be reviewed by budget staff to determine completeness and quality. This indicates increased dialogue and engagement in the budget process, especially considering the challenges faced by the referendum and the need for creating multiple budget scenarios.</p> | <p>Analyze the data that give evidence to lack of progress toward the plan.</p> <p>We created a team to review curriculum and determine opportunities for integrating information about/opportunities for the school/district budgeting process into curriculum. Our initial work demonstrated a need to recreate our vision for this course for students. The strategy initially considered by the Office of Finance does not align with the coursework offered by our partners in the schools. The program intended by our school-based educators emphasized creating business products and solving private-sector business problems. The finance team has redefined our student involvement plans for improving the district’s budget outreach strategy to include a smaller, more interested student cohort that would be involved in Department of Financial</p> |

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| <p>During December and into January, a survey was created to understand the opinions of the staff and community as they relate to next year’s budget and their priorities. Data were collected and used as feedback.</p> <p>Steps conducted so far have incorporated input from staff, principals, Central Services staff, and the community. Given the budget shortfall and the need for holding a referendum, our group pivoted from previously planned efforts to a focus on planning, conducting, and educating the community about the referendum. While this work was different from what was originally intended, it demonstrates our increased capacity and agility to conduct practical budget and financially related outreach and education to the district and general public.</p> | <p>Planning and Budget Services efforts in an internship-like capacity. Students will be involved in explaining MPS budgets, the budgeting process, and the district’s constraints through producing short, entertaining digital media. Our hope is that their perspective will be effective at communicating to their peers, parents, and the wider MPS community.</p> <p>While we surveyed the staff and community about next year’s budget and their broad lever priorities, these priorities were not linked to funding.</p> <p>We have begun direct consultation work with Balancing Act, our vendor, and our account concierge. Through this consultation, we decided to adjust our implementation strategy and timeline to align with the best practices identified by their implementation experts. Going forward, we will work with Balancing Act representatives to determine budget parameters, upload our district’s budget data, and identify policy options and fiscal levers that can be manipulated by the software’s users. This information will initially be tested via an internal “soft launch” with internal stakeholders at the level of school and office/department leaders. These action steps will be moved to the 2024–25 action plan.</p> |
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| A | ACT: Revise or continue with implementation based on data analysis |
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What will you change about your plan for the next quarter?

While we have completed the preliminary parsing of budget data, we need to also add this action to the 2024–25 plan as the information will be more closely related to the use of the Balancing Act program.

Action steps related to the visualization system being released for limited usage and collecting usage data will be moved to the 2024–25 action plan.

We will plan how budget information will flow to the interactive budget visualization system on an annual basis. We will work with vendors’ needs to continue into the summer for next year.

The following steps are moved to June of the 2024–25 action plan:

- Plan how budget information will flow to the interactive budget visualization system on an annual basis.
- Prepare prototype of broad levers for display and manipulation.
- Populate actual data for display.
- Test visualization system for accuracy, limitations, etc.

- Release visualization system for limited usage.
- Collect and analyze usage data and user feedback, and make recommendations for improvement for 2024–25.

The team needs to redefine our strategy for student engagement and determine a new timeline.