MAKE THE SHIFT FROM “DEFENSE” TO “OFFENSE”: FIVE CONSTRUCTIVE QUESTIONS TO REFRAIME BUDGET DISCUSSIONS

School business officials are often viewed as the “naysayers” of budget talks. When discussions are dominated by the criteria of student needs and alignment with strategic priorities—which can be easy to prove and difficult to criticize meaningfully—SBOs are further challenged to present a counterargument that seems in the best interest of students. Create a collaborative climate for budget discussions by asking each program’s advocate legitimate, important, and constructive questions about their proposed expenditures.

What is the per-pupil cost of this program?
A program may have a relatively low price tag but serve only a small number of students, or require a large investment but serve every student. This question helps to highlight how many students each program will serve, who they are, where they are located, and how this will help the district achieve its goals. If the cost per pupil is relatively high, the next reasonable question is whether there is a way to approach the same identified needs that would be more cost effective.

Does this program duplicate any existing programs? Is there something that already targets the identified needs, population, or area of improvement? Can the existing program be expanded to achieve the same goals as the proposed program? If more programming is deemed necessary in this area, continue with the following questions.

Is this program coherent with existing programs? How will they coexist? What kind of coordination will be necessary to make them both work? Consider which divisions and departments will need to work together to optimize the usefulness of the program and whether that is realistic.

Is it feasible to implement the program with fidelity? Does the department making the request have a strong track record of making effective use of the programming or funding they have received? Do they have the capacity to implement this program? Does
MAKE THE SHIFT FROM “DEFENSE” TO “OFFENSE”: (CONTINUED)

the district have the necessary resources to support the program, such as transportation or supplemental staff?

What is the expected return and how long will it take? If you want to manage something, you must be able to measure it. Ask the program's advocate to set tangible measures of progress and success. Creating a time frame to achieve that progress assists in plan development and creates accountability.

Prepare to have more effective conversations about proposed expenses by informing yourself about the programs your district already has in place. Know the range and average of your district's overall program costs and cost-per-pupil as well as how many programs have been implemented by each department and how those programs are performing. This knowledge will give you the data and evidence to make your questions—and the answers to those questions—meaningful.

Creating a culture of engaging in constructive conversations can dismantle the adversarial dynamic of budget talks and will encourage those requesting funds to consider their proposals thoroughly and thoughtfully, increasing each program's chance of success. Remember that budget discussions are not about winning, but about helping people think through what they are trying to accomplish, for whom and for how long, and to make better decisions regarding those goals.

PREPARE TO HAVE MORE EFFECTIVE CONVERSATIONS ABOUT PROPOSED EXPENSES BY INFORMING YOURSELF ABOUT THE PROGRAMS YOUR DISTRICT ALREADY HAS IN PLACE.

WHAT’S NEXT
A budgeting model that provides quantifiable information on the performance of each investment makes it possible to create an overall view of a district's existing programs and can inform decisions on both adding and discontinuing expenses. Refer to this article in the September 2018 issue of School Business Affairs to learn the six major factors that can help SBOs evaluate budget items.

Content in this School Business Minute comes from the 2019 Annual Conference & Expo education session “Strategies to turn ‘Defense’ into ‘Offense’ in Budget Discussions.”

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