

MEMORANDUM

DATE: June 2, 2022

TO: Members of the Alexandria City School Board

FROM: Budget Advisory Committee (BAC)
Nancy Drane (Chair); Selena El Hajji; Sukumar Rao; Ryan Reyna; Bridget Shea Westfall

SUBJECT: Budget Communications

CC: Dominic Turner, ACPS Chief of Financial Services
Robert Easley, ACPS Director of Budget, Financial Systems, and Reporting
Kathy Stenzel, Alexandria City Budget and Fiscal Affairs Advisory Committee

The Alexandria City School Board Budget Advisory Committee (“BAC”) presents the following report and recommendations to members of the Alexandria City School Board (“Board”) in furtherance of BAC’s 2021-2022 [Scope of Work](#). We wish to express our gratitude to ACPS staff and our Board liaison for their support as this memorandum was developed.

BACKGROUND

BAC surveyed School Board members during its 2019-2020 term to solicit input on the potential scope of BAC’s activities and desired outcomes. (The results of that survey are available [HERE](#).) The first deliverable was BAC’s May 2021 report on the budget calendar, with a special focus on sequencing with the City’s budget activities. (That report is available [HERE](#).)

Budget-related communications and community engagement came up in the 2019-2020 Board survey and again in BAC’s May 2021 report – both equitable, accessible, and meaningful engagement within the ACPS community (i.e., to ACPS families, students, and staff) and communication to the Alexandria community writ large. (May 2021 BAC recommendations related to communications are excerpted in *Appendix 1*.) BAC’s view was that strategic efforts to diversify engagement opportunities beyond traditional formats like public hearings might bear fruit, and that collaboration with the FACE Center, PTAC, and BAC could be beneficial. BAC also surmised that exploration of approaches outside of ACPS could produce interesting models for ACPS staff to consider. ACPS staff agreed that BAC’s work in this area would be well-timed, since the ACPS finance and communications teams were interested in strengthening budget-related communications. This memo is a result of that work.

GOALS, PROCESS, AND ROLE

BAC’s goal in taking on this work was to identify ways to strengthen community engagement related to the ACPS budget. In particular, BAC hoped to develop recommendations to ensure that:

- the community can easily access budget-related information, both process and substance;
- those interested in providing feedback or commenting on the budget know when and how to do so; and

- communication and engagement opportunities are offered in multiple modes in order to equitably address the needs of Alexandria’s diverse population.

In order to achieve these goals, BAC explored these issues and ultimately developed a set of recommendations for the Board and ACPS staff to consider. We discussed budget-related communications with ACPS CFO Dominic Turner and ACPS Director of Budget & Financial Systems Robert Easley, ACPS Chief of School and Community Relations Julia Burgos, surveyed PTAC leaders and met with PTAC executive leadership and members, and conducted other research. We reviewed eight jurisdictions of varied sizes that were either geographically close to Alexandria or shared demographic similarities.¹ (A chart with those jurisdictions listed and links to BAC’s internal worksheets is available in *Appendix 2*). BAC’s research also included general principles for school-related communications found in trade and other publications.²

Our work included the exploration of:

- current methods of community engagement in the ACPS budget process;
- review of ACPS budget-related public facing materials, including ACPS website;
- established best practices in budget-related communications;
- communication and engagement strategies utilized in other jurisdictions on budget related topics; and
- additional research and/or recommendations as relevant.

BAC saw its role as an idea-generator, bringing best practices and creative ideas from the community and/or other jurisdictions to the Board and ACPS staff for their consideration to supplement the important work already being done at ACPS in this area. BAC recognizes that with every new idea comes the need to secure resources to implement it. BAC examined a range of jurisdictions; some comparable in size and staff to ACPS, some larger, some smaller. Some of the strategies described here are from jurisdictions that have much larger finance and/or communications teams than ACPS, and thus greater staff capacity. Some ideas might be things ACPS could do right away, where others will require longer-term planning and resource development. As the Board considers these recommendations, it should be realistic about how or if ACPS has the capacity to implement any ideas here, and what tradeoffs might need to be made to do ‘new’ things. In the end, we trust that these ideas will be considered by the Board and ACPS staff in the spirit in which they are intended – to be helpful in identifying additional tools that might strengthen our shared goal of strong, equitable community engagement.

¹ BAC examined Abilene, TX; Arlington, VA; Brookline, MA; City of Falls Church, VA; Fairfax County, VA; Highline, WA; Montgomery County, MD; South Bend, IN. Links to these jurisdictions’ websites, BAC-created worksheets on each jurisdiction, and demographic profiles are in *Appendix 2*.

² Some of the materials BAC reviewed included (*hyperlinks included*): [Money Matters: Communicating about school budget challenges](#) (k12insight.com); [Understanding school finance is one thing, being effective in communicating about it is another skill entirely](#) (learningpolicyinstitute.org); [Best Practices for Communicating Data to Parents and the Public](#) (dataqualitycampaign.org). The National School Public Relations Association recognizes excellence in school-related public relations by category, including finance publications. See <https://www.nspr.org/awards/gold-medallion-winners> (note ACPS received recognition for its renaming project here).

ACPS BUDGET COMMUNICATIONS OPPORTUNITIES

Community members, particularly those with leadership roles among ACPS families, shared with BAC their interest in better understanding the ACPS budget and its development. PTAC leaders, for example, shared that they would like to better understand the budget timeline, how priorities are developed by the Board, the role of Federal funding, and the relationship of the City vis-a-vis the ACPS budget. They also voiced an interest in better understanding the budget realities ACPS faces, such as the high percentage of funds dedicated to staff-related costs, and suggested a “fixed facts” or “fast facts” type document would be beneficial.

Another theme that emerged from BAC’s work was that budget engagement should not be limited to one time during the year. To be most effective, the community should be thinking about budget engagement at all times. One point made, for example, was that those advocating for new or significantly increased investments should not wait until the traditional budget process to do so, as it might be “too late.” (An example was a recent effort to add ASL language instruction at the high school, which, even if funds were identified during the budget process, had to go through the program of studies development process in order to be implemented.)

Community members also expressed an interest in more opportunities to engage in dialogue and two-way communication with ACPS staff and the Board on budget topics in order to supplement some of the information-session type presentations that are currently offered or publicly available (like Board presentations). PTAC leaders voiced an interest in helping the community to better understand when and how to advocate. For example, community members might get a text about an upcoming budget hearing, but they’d benefit from knowing how that hearing fits into the larger context.

As a result of those conversations and BAC’s work, we identified a series of moments where communications and engagement are particularly important. The recommendations that follow should be viewed as applicable to each of these moments:

1. *Budget Priorities* – The substantive budget priorities and rules of engagement established by the Board are important drivers for the budget work that follows. They are guided and informed by a comprehensive set of materials prepared by ACPS staff, including achievement data, and the Board’s pre-established strategic vision. This is an early opportunity to get feedback from the community on what it sees as budget priorities, consider this feedback, and in turn to communicate with the public about what the Board has decided its budget priorities will be for the coming budget year.
2. *Beginning of Budget Process and Timeline* – To be best engaged, the community needs to understand the budget timeline and process. It is complicated, and needs to be presented in an accessible and understandable way. Even the calendar itself is dense and hard for a lay person to understand. There should be clear markers for when and how community feedback will be accepted and considered by the Board, and the import of each stage (e.g., what is an “add/delete” session?) The Community Budget Forum, typically held in October, is a good vehicle for this type of framing information, and it should be continually reinforced throughout the process.
3. *Superintendent’s Proposed Budget* – The release of the Superintendent’s proposed budgets - both CIP and Combined Funds – are also key milestones in the budget process.

Comprehensive budget materials, including an almost 500 page ‘budget book,’ are prepared to detail what has been proposed. Helping the public understand and absorb what is in the budget, how it reflects the Board’s budget priorities, and the tradeoffs and realities that had to be considered in developing it are critical.

4. *Board Consideration and Adoption of Budget* – The public needs to appreciate the role and responsibilities of the Board as it considers the budget before it. What level of flexibility does it have? What steps can it take to modify what has been proposed? Where and how can the public weigh in? These are all important factors for the public to understand.
5. *Consideration by the City Council* – Once adopted by the Board, the budget goes to the City Council for its consideration. The relationship and roles of the respective bodies vis-a-vis the budget are often misunderstood by the public. Helping the community appreciate the Council’s role and how it plays into the overall budget process, and whether and how advocacy there could be valuable, is important.
6. *Special Issues* – Finally, there may be ‘special’ budget-related issues that arise that require individualized communications strategies. For example, the considerable pandemic-related Federal funds made available to ACPS require more targeted communications. What was received? How can and will ACPS spend it? What are the relevant timelines? How will updates be provided and what will ongoing engagement look like through the lifespan of those funds?
7. *Budget ‘Parking Lot’* – There are often issues (like the ASL example above) that come up during the budget process. The Board suggested a process to identify and follow up on these issues after the budget process is completed in order to prepare for the next budget year - a ‘parking lot’ of sorts - so that those issues are not forgotten or overlooked until the next budget year is underway (avoiding the “raising the issue too late” problem).

RECOMMENDATIONS

ACPS staff have already taken considerable efforts to prepare and provide a wide array of budget related information to the public, and each year staff actively seeks ways to strengthen its approach. These efforts supplement other, broader efforts ACPS takes to communicate with the community. In addition to continuing all of its current communications efforts, the following recommendations contain BAC’s suggestions for refining or expanding these efforts further.

Communication Channels (Two-Way and One-Way): ACPS should continue to pursue multiple communications channels and platforms to strengthen public engagement and participation in budget development and review.

Most jurisdictions BAC reviewed offer traditional engagement opportunities similar to those offered by ACPS, like public hearings, newsletters, and information sessions. Some jurisdictions utilize other affirmative outreach and engagement strategies to facilitate and enhance public engagement, using multiple platforms. ACPS should continue to strengthen the strategies it currently employs and consider other ways it might enhance its current communications strategy. BAC has provided some examples below.

In doing so, BAC identified some general principles and best practices that should be considered:

- Identify key audience groups (i.e., parents, staff, community members, sub-populations) and individualize key messages for each audience segment

- Link the budget/finance issues to student experience (i.e., additional funds for this project will mean this in the day-to-day experience of students)
- Offer a combination of information heavy events (i.e., budget information session) with events where the goal is to listen and receive feedback from the community; if trying to do both, ensure each gets equal time and attention (for example, in South Bend, Indiana, events had a standard balance of 30 minutes presentation and 90 minutes discussion)
- Offer the public and those inside the system a means to weigh in on financial decisions, and be clear about when and how to do so
- Use school principals and administrators – either as messengers or in the message – as they are often the most trusted people in the education system
- Ensure broad language access³ and acknowledge the community processes information in different ways; it is important to provide information and opportunities to engage in multiple languages, multiple formats, and multiple times. Our city continues to grow and we need to make sure that every community member can access and be involved in these conversations in order to promote equitable engagement
- Remember that not all social media platforms are accessible to families, either at all or if they are accessing at their workplace; ensure that meetings have transcripts or recordings that are prominently displayed and shared so that community members do not have to participate live in order to access the information; consider sending summaries in the ACPS Express as you do for Board and other meetings

The following ideas emerged as among those ACPS might consider, or enhance, in the future. While we believe that each event would benefit from two-way communication, we've segmented approaches that are typically one-way versus those that are typically two-way:

Budget orientations and information sessions (one or two-way) – For many years, Alexandria has offered a Community Budget Forum early in the academic year to orient community members to the budget process. In 2021, the forum enjoyed an attendance of almost 150 community members as a result of ACPS staff pre-engagement with the FACE Center, PTAC, and BAC. The forum provides a valuable function to deliver information and framing for the budget process. However, while there are opportunities for questions and comment, the forum has typically leaned more towards reporting out to attendees. (Some of these balance has been impacted by the shift to virtual format.) BAC encourages ACPS staff to consider whether the forum should be branded as an 'information session,' with then separate opportunities that are dedicated to receiving feedback from the community; those listening sessions could be at ACPS settings, but also in the community like public libraries, community locations, etc. If doing both informing and listening, there should be an intentional balance of formal presentations and informal discussion. ACPS might consider using a community facilitator for the discussion portion to supplement staff support.

In-person public conversations with the Superintendent and/or Principals (two-way) – several jurisdictions incorporated a 'budget tour' of sorts, having the Superintendent and other division leaders host conversations at individual schools (i.e., through the PTA) or other community groups (i.e., Casa Chirilagua) on the budget. For example, the Superintendent in the City of Falls Church, VA held [Joint PTA meetings](#) and a "Budget Road Show," a series of community meetings held at individual schools, alongside building principals. Dr. Hutchings currently participates in these types of events,

³ For example, FCPS [ESSER materials](#) have very clear instructions on how they can be translated to different languages or adapted to support individuals with disabilities.

but BAC is not aware of any specifically focused on budget issues at individual schools or non-school community locations.

Online Discussions (two-way) – other jurisdictions utilized online communication tools to engage and reach interested community members; an important diversification of platforms. In South Bend, Indiana, the Superintendent hosted “[Talks with Todd](#),” Facebook Live events with the Superintendent to discuss various financial topics, including the budget, stimulus funding, etc. Again, Dr. Hutchings has participated in these sort of events, but BAC is not aware of any specifically focused on budget issues.

Public Hearings (one or two way) – ACPS has traditionally held public hearings, the most formal way for community members to offer feedback on the budget. These are well advertised to community members by text, email, etc., and offer a ‘real time’ chance to comment as the Board actively considers the budget. These should not be viewed as the only opportunity for community engagement, however. Public hearings can be hard to place on the budget calendar, and sometimes they fall ‘too late’ in the budget process to make significant changes. Public hearings often fail to have engagement from a broad swath of the community, likely due to the formality of the format. Finally, BAC would recommend that ACPS provide more context when advertising public hearings so that community members better understand the stage in the budget process and role of the hearing. For example, a recent May 2022 Board public hearing on the budget was well advertised, but BAC fielded questions from several community members seeking guidance on what the substance of the public hearing would be, what type of feedback would be relevant, etc.

Targeted outreach to non-school related community stakeholders (two-way) – As we all know, the entire Alexandria community benefits from investment in ACPS. BAC found several jurisdictions had clear strategies for affirmative outreach to non-school related community stakeholders to encourage broader community interest and participation in the schools and the budget process. Fairfax County has a [partnership with community citizens associations](#) to present information and gather feedback on the budget. Highline, Washington has a “[Senior Citizen Gold Pass](#)” to engage older community members with the schools among other targeted approaches. Ideas like these present an opportunity for ACPS to widen its reach, either by utilizing non-school venues for events (i.e., libraries, recreation centers, community non-profits) for presentations APCS typically does, or to leverage existing community outreach events organized by the city to include information about investments in ACPS. It could be as simple as adding a line about the budget in a community flier to invite questions or feedback, recognizing that staff time is limited. ACPS might even issue formal invites to community partners to ask them to engage in the budget process, or for help in engaging their constituencies.

Use of multiple channels to solicit and receive feedback (one-way) – In BAC’s view, the most successful jurisdictions were those that had multiple channels available to community members to ask questions, share support, or provide feedback. For example, Arlington, VA offers community members the chance to communicate their views via e-mail, an online form on the budget website, phone number/voicemail, and even created a budget specific Twitter account (e.g., “#APSBudget”) to encourage public conversation about the budget. Brookline, Massachusetts has a [Google form](#) to submit questions – and a link to that form [appears on virtually every budget page](#) (including in each page of the interactive budget book) constantly reminding readers in real time how they can submit comments or questions. Fairfax County, VA uses [SurveyMonkey](#) to elicit feedback from the community. ACPS is doing most of these things in one way or another, and these efforts should be continued and where needed, strengthened.

Traditional Media (one-way) – budget releases are often covered by local media, but BAC reviewed at least one strategy where traditional media channels were used as an *affirmative* communication tool. For example, the Superintendent of the City of Falls Church, VA [penned an op-ed in a local paper](#) that was published around the same time as his budget release. The Op-Ed detailed the budget and thanked the community for its support of the schools through the overall city budget. This struck BAC as a particularly effective way to reach community members who are not otherwise connected with the schools.

Website (one-way) – ACPS has continued to strengthen the budget section of its website, a critical repository of budget-related documents (current and historical), information about the budget process, and public engagement opportunities. It now also contains links to key presentations, including the Community Budget Forum. There are buttons for community members to send “Comments and Questions.” BAC understands that the website will undergo additional improvements in the near term, which will be an opportunity to fine tune what is available. As discussed the next section, the use of graphics, videos, and other tools, with more effective cross-referencing, would make the website a more dynamic and accessible community resource.

Newsletters and other communications (one-way) – ACPS has developed other affirmative approaches to budget-related communications. For example, it issues a monthly CIP Newsletter. While focused on the status of capital projects, it includes budget-related information and gives a sense of the content of the CIP budget. A newsletter format could be utilized for broader budget-related communications, perhaps incorporating quarterly budget reports to the Board, key budget happenings and engagement opportunities, etc. This would also be a place to share key reporting that ACPS has made during the subject period, either to the Board, City, State, or on the Federal level, and identify any barriers to spending down funds that would be helpful context for interested community members. (For example, ACPS has done a good job explaining how supply chain issues have impacted some capital project timelines.)



Communication Tools: ACPS should complement its current budget communications strategy with additional tools to aid the public in better understanding its budget.

One of BAC’s goals in drafting these recommendations was to further the shared goal of ensuring that the community is able to easily access and understand budget-related information, both process and substance. Generally, BAC found that there *is* a significant amount of information available related to the budget, but it is often dense and was not always easy to navigate, find, or understand. The utilization of some of the approaches described below could strengthen ACPS’ communication tools and provide greater ease of clarity for members of the community.

In doing so, some general principles and best practices should be considered:

- General ‘best practice’ school communications guidance we found emphasized that messaging should be kept simple, in smaller bits in easy-to-understand formats, with an

emphasis on the use of charts and graphs to help provide a visual representation of the facts and add context. ACPS uses a “bite-snack-meal” approach that is in line with these principles.

- Make sense of the data – what do the numbers mean in practice? Add narrative explanations alongside data or budget line items to explain the investment in practical terms. (The interactive budgets described below are a good example of this.)
- Use plain language and communicate with dollar amounts and acknowledge tradeoffs, but avoid using business lingo

The following ideas emerged as among those ACPS might consider, or enhance, in the future:

Effective Cross-Referencing – We found one of the greatest challenges in maintaining budget related communications is effective cross-referencing and consolidation across a singular platform (e.g., website). Budget related information can be found in multiple areas of the site, which can make it confusing and frustrating for the user. At their best, budget related materials contain cross references to other, relevant material, such as Division programs that are to be funded. Interested readers may want to learn more about these topics, either to better understand what is being funded beyond a simple title, or to gain a more in-depth understanding of the area of Division practice. While the ‘three-click’ rule has apparently been debunked in some circles, the goal still should be to reduce the time a user takes navigating a website to find what they are looking for. ACPS materials would benefit from a comprehensive review with an eye towards more robust cross-referencing. BAC identified a few examples:

- The [ACPS main budget page](#) has a link to the 2021-2022 ‘Areas of Focus.’ When you click on that link, you [reach a page](#) that has those areas listed in shorthand (i.e., “Math Recovery”). But that is where it ends. If a community member wants to learn more about an individual area of focus (i.e., what does “Math Recovery” mean in more practical terms or for what grade levels) there are no further links.
- ACPS has a [designated page on the use of ESSER III funds](#) but it does not include a link to a very helpful [Board presentation on ESSER III fund usage from May 5, 2022](#). This would be the type of information anyone accessing the main page is likely looking for. Similarly, other reports or updates ACPS has prepared for the Board, City, State, or Federal entities on its budget expenditures or activities should also be cross-referenced throughout for the benefit of those community members who wish for a ‘deeper dive’ into how the funds are being utilized.
- ACPS has a [budget page dedicated to the CIP](#) but that page doesn’t have links to a [page listing community forums related to the CIP and the monthly CIP newsletter](#). Those links would enhance that page and show how the funds are being put to use in practice
- Again, these are just a few examples to demonstrate the type of cross-referencing BAC believes would be beneficial.

Interactive documents – the most successful budget documents we reviewed allowed for interactivity with the user to enliven otherwise dense material and make it more navigable. For example, Highline, Washington has an [interactive budget book](#) that breaks down the budget by topic and area, with helpful visual depictions. Those interested in learning more about the special education budget, for example, can find that information via a drop down menu:

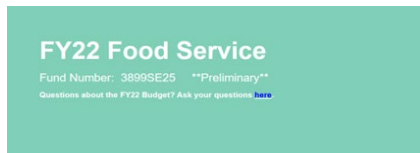
Special Education

SELECT DEPARTMENT
Special Education

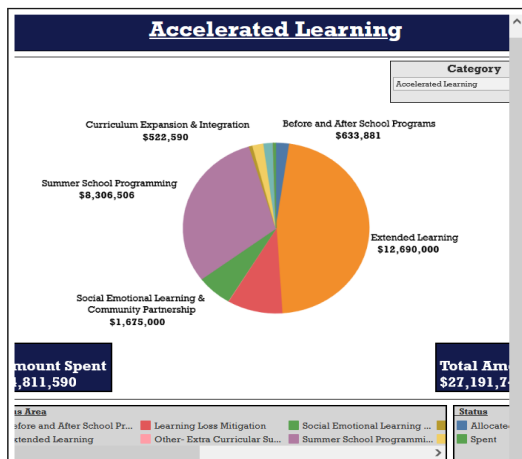
Special Education provides appropriate educational opportunities designed to meet each student's unique learning needs. Special Education offers screening clinics that provide parents with information about their child's academic, vision, hearing, language, cognitive, and motor skill development.



Similarly, Brookline, Massachusetts has an [Interactive Financial Plan](#) that includes narrative content alongside quantitative budget summaries, separated by topic. For example, a page on [Food Service](#) included the staff point of contact, a description of the program, historical and current data on revenues/expenses, and further narrative like “recent developments,” “current challenges,” “significant changes,” and “on the horizon.” (The Food Service sample page is available in *Appendix 3*.) This was one of the more effective ways to explain in practical terms what a particular line item addressed.



Trackers – several jurisdictions that BAC reviewed have ‘trackers’ available to the public to detail spending or budget investments. For example, South Beth, Indiana has a [Federal funding/ESSER tracker](#) to show the public what has been received and how those funds have been utilized. It includes the topic (e.g., accelerated learning), how that funding was distributed (e.g., summer school, extended learning, etc.) and the amount spent (e.g., \$4.8M) versus the total allocated (e.g., \$27.1M).



Dashboards – we also found several dashboards that served as effective tools to capture budget related content. For example the State of Illinois has [an interactive data dashboard](#) that provides a summary of financial data with key financial metrics (e.g., trends in spending over time; where a certain expenditure fits into a larger section of the budget). Users can even view school spending data alongside data from other schools in their district. Dashboards might also include links to publicly available reporting ACPS does on its expenditures. On a much larger scale, [USA Spending](#) is an example of an effective dashboard that includes information and links to relevant reporting.

Other Data Tools – BAC found other data tools, large and small, which facilitate user accessibility and engagement:

- *QR Codes* – the use of QR codes can ease access to budget related documents with the click or a snap. For example, in South Bend, Indiana, a QR code was widely available and took users to a COVID funding spending tracker.
- *Embedding video* – another simple but very popular tool within BAC was the City of Falls Church, Virginia’s practice of [embedding video screenshots on its main budget page](#) that linked to specific parts of Board meetings where budget presentations were made or issues were discussed. We have all experienced the frustration of scrolling through a long video trying to find the discussion we are looking for (and often, giving up). The links here got the user directly to the budget-related portion of the meeting. ACPS staff agreed this could be a huge value add to the ACPS website.
- *Graphics* - infographics can be very effective ways to communicate complicated information; consider ACPS create a quick infographic on the budget formulation and process, for example

Communication Topics: ACPS should create additional materials to provide greater detail on specific topics or substantive areas of its budget.

One thing that we heard from community members was a desire from some to ‘dig deeper’ into the budget to learn more about specific areas of interest. Indeed, BAC has fielded inquiries from members of the community who had questions about investments in particular areas of ACPS. This is in keeping with some of the best practices that BAC collected that suggested targeted, individualized budget-related communications.

BAC identified topics that might benefit from more detailed explanation and analysis, listed below:

Budget process – standalone materials on the budget process were cited as one of the areas where community members seek additional information. Visual graphics on the budget process and where in the process the division is were viewed as particularly helpful. For example, Arlington, Virginia has a [short overview of the budget process](#), together with a [graphic that highlights where the Division is currently in the process](#) at any given time. Fairfax County has a [video](#) called, “understanding the budget,” that reviews budget priorities in staffing, sources of funding, the realities of budgeting and ‘hard choices’ that need to be made, etc. Fairfax County also has a [video](#) on budget “fast facts”.



BAC found an archived ACPS page from FY17 with a good [overview of the process](#). The American Association of School Administrators has a School [Budget 101 guidance](#) on relevant issues to inform the community of.

Federal funding – Highline, Washington has a [dedicated page](#) to summarize ESSER related spending and priorities. Not only does the page have general information, it [links to another page with detailed project plans](#) in each area being supported by ESSER funds (e.g., [Investments in Student Well Being](#)). Fairfax County shared [detailed ESSER reports](#) and has a [video](#) demonstrating how ESSER funding is being used in classrooms.



APS also has a clear and easy to read [report on ESSER funding](#). BAC understands that ACPS intends to hire an FTE dedicated to ESSER-related communications. Ideally, these types of strategies could be supported through that additional capacity.

Budget Snapshots – BAC reviewed several effective budgets ‘at-a-glance’ or snapshots, including examples from the [City of Falls Church](#), [Arlington County](#), and [Brookline](#). Brookline also has a fact sheet on [“Budget Drivers.”](#) which explains the main drivers of decision-making around the budget. BAC members also liked a [2-4 page document](#) in Fairfax County on budget highlights.

Budget Priorities – As stated at the beginning of this memo, ACPS sets budget priorities at the beginning of the process that frame the budget that follows. While the ACPS main budget page has a link to ‘Combined Funds Budget Priorities,’ that simply directs users to the Board Meeting agenda from the day those priorities were approved. This could be an opportunity to link to a polished, one page document that summarizes the priorities, and even a link to the portion of the Board meeting where they were discussed and debated.

Other substantive areas – BAC received feedback on particular areas of the budget where more detail would be helpful:

- *Compensation* – The City of Falls Church, Virginia developed a summary entitled, “Compensation Adjustments Explained” that summarizes and breaks down a common, albeit complicated, part of the budget.
- Other areas of interest included mentioned to BAC included – *Special education; Athletics; Fine Arts and Music; Dual Language and EL*

Conclusion

One last general principle BAC reviewed was the idea of continuous improvement. For any strategies identified or materials created, there should be a prominent feedback process, including opportunities to solicit written and verbal feedback; conduct evaluation to survey audience attitudes and understanding; and room to adjust messaging and delivery as necessary based on feedback received.

We also encourage ACPS to develop metrics to measure its investments in budget related communications. Measures could include replies to surveys or comment forms; attendees at meetings, forums, or public hearings; positive feedback on budget tools; etc.

BAC is pleased to submit this information to the Board for its consideration. BAC appreciates the School Board's support of its work and will endeavor to continue to provide the best recommendations possible on the budget and fiscal affairs of Alexandria City Public Schools. Board members are welcome to reach out to BAC with any feedback on BAC's report through its Chair, Nancy Drane, who may be reached at 202-997-0294, bac@acps.12.va.us, or nancydrane@aol.com.

APPENDICIES

1. Excerpts from BAC Memo on Budget Process
2. Profiles of Jurisdictions Reviewed by BAC
3. Sample Interactive Budget Page: Food Service (Brookline, MA)

APPENDIX: BAC MAY 2021 BUDGET PROCESS REPORT [EXCERPTS]

4. The Board should revamp its public engagement on budget issues to be more equitably accessible, meaningful, and efficient, in keeping with the Board's stated equity and inclusion goal. ACPS and the Board should create a detailed and actionable communication plan related to budget-related engagement. Giving parents and community members multiple ways to engage that do not require physically appearing at a public hearing would allow for more equitable access to providing feedback to the Board. This approach, while independently valuable, may also create opportunities to streamline the budget calendar to allow for the alignment referenced above. It may seem counterintuitive to adjust or reduce formal public engagement calendar items on an issue as critical as the budget, but in BAC's view, "bigger is not better." ACPS public engagement opportunities like the Community Budget Forum and public hearings on the budget are often poorly attended and participation is not diverse, nor representative of the community. BAC's view is that being more strategic, deliberate, and targeted with public engagement might yield better results. Further, equity demands engagement opportunities other than formal public hearings. **Elements of this budget engagement plan should include:**

- a. multiple modes of communication, genuine collaboration, and engagement with external stakeholders;
- b. a work plan calendar that allows for sufficient notice to the public for budget-related opportunities/events;
- c. a consideration of how this engagement translates to community members who do not have family members enrolled in ACPS, with emphasis for the importance of investment in ACPS as a community good;
- d. means to solicit participation from ACPS families and the larger community in its various budget-related public engagement tools well in advance using email, text, and more on-the-ground outreach, such as through the FACE Center, PTAC, PTAs, and other community groups (e.g., Casa Chirilagua);
- e. use of online tools like a survey/comment page on Division's budget page (e.g., used in Fairfax County and Newport News) to solicit feedback on the budget; and
- f. acceptance of written comments (in lieu of live testimony) during Board meetings and public hearings and continued allowance of video, rather than in-person testimony; consider tools like "think tank" that promote interactive engagement during public hearings or other forums

5. The Community Budget Forum, traditionally held in October, has been a missed opportunity for public engagement and should be revamped if continued. ACPS should reconsider its goals in offering the Community Budget Forum (i.e., education about the budget process, soliciting feedback on budget priorities, reviewing the content of the budget, or something else) and whether the format and timing is appropriate. It may be that other public engagement approaches, as described above, would be more effective in meeting ACPS's goals here. If the event is continued, ACPS budget staff should partner with the FACE Center, PTAC, or other entities well in advance to gain feedback on program format and ideas for generating interest and participation. BAC is of course also willing to be a partner in this effort.

7. ACPS budget staff has made positive improvements to the website in the past several years – ACPS should continue to pair the public engagement opportunities listed above with robust public information on budget-related issues (e.g., interactive and educational materials on ACPS budget web page).

8. ACPS' efforts to improve its budget-related communications through use of short, digestible fact sheets and on the budget "telling a story," etc. should be pursued. For example, the published budget calendar, while comprehensive, is hard to read and could be streamlined for public-facing communications.

Appendix 2: School Divisions Examined (includes hyperlinks to websites and BAC worksheets on each jurisdiction)

Jurisdiction	Main Webpage	Budget Information	More Info.
Abilene, TX	https://www.abileneisd.org/	https://www.abileneisd.org/departments/finance/	Detailed Worksheet
City of Alexandria, VA <i>(for comparison)</i>	https://www.acps.k12.va.us/	https://www.acps.k12.va.us/Page/488	
Brookline, MA	https://www.brookline.k12.ma.us/Page/1	https://www.brookline.k12.ma.us/Page/108	Detailed Worksheet
Arlington County, VA	https://www.apsva.us/	https://www.apsva.us/budget-finance/	Detailed Worksheet
City of Falls Church, VA	https://www.fccps.org/	https://www.fccps.org/page/fccps-budget	Detailed Worksheet
Fairfax County, VA	https://www.fcps.edu	https://www.fcps.edu/about-fcps/budget	Detailed Worksheet
Highline, WA	https://www.highlineschools.org/	https://www.highlineschools.org/departments/business-finance	Detailed Worksheet
Montgomery County, MD	https://www.montgomeryschoolsmd.org	https://www.montgomeryschoolsmd.org/departments/budget/ https://www.montgomeryschoolsmd.org/budget-101/index.html	Detailed Worksheet
South Bend, IN	http://sb.school/	https://www.sb.school/about/departments/financial_services https://www.sb.school/about/departments/financial_services/budget_information	Detailed Worksheet

Demographic Information

Jurisdiction	Enrollment	White	Black	Hispanic	Asian	Low Income
Abilene, TX	16612	35%	13%	46%	1%	68%
Alexandria City, VA <i>(for comparison)</i>	16295	28%	26%	37%	6%	37%
Arlington County, VA	26895	47%	28%	10%	9%	21%
Brookline, MA	7800	53%	5%	10%	20%	12%
City of Falls Church, VA	2515	72%	4%	8%	12%	8%
Fairfax County, VA	180000	37%	10%	27%	20%	27%
Highline, WA	19130	19%	15%	40%	15%	61%
Montgomery County, MD	160564	27%	21%	32%	14%	28%
South Bend, IN	16750	27%	38%	24%	1%	65%

Appendix 3: Brookline Public Schools, Interactive Budget

This is an example of the type of information included in Brookline Public School's interactive budget portal. The full portal is available at:

<https://stories.opengov.com/brooklineschooldeptma/published/FP4G509Jw>. The example is one part of the budget, *Food Service*. This sample page is available at:

<https://stories.opengov.com/brooklineschooldeptma/published/3CSZsmz50>.

FY22 Food Service

Fund Number: 3899SE25 **Preliminary**
 Questions about the FY22 Budget? Ask your questions [here](#).

Director/Program Coordinator:
 Matthew Gillis, Director of Operations

MGL Authorization:
 Ch. 584 of the Acts of 1948, as amended by Ch. 650 §1969

Year Established:

Program Description:
 The food service program provides high quality meals to students and employees in each building. The program aims to give students attractive meals that are both affordable and nutritious. The Program is self-operated, directed and staffed by district employees.

Program Time Table:
 School Year and Summer School

Fee Structure:
K-8:
 Breakfast \$2.00
 Lunch \$3.55
High School:
 Breakfast \$2.00
 Lunch \$3.80
 Premium Lunch \$4.50 - \$10.00
 Dairy/Lactaid Milk \$0.75
 Soy Milk \$1.50
 100% Juice \$0.50
Reduced Price:
 Breakfast \$0.30
 Lunch \$0.40

Fund Balance Policy:

Fund Restrictions:

Data

Expand All	2018-19 YTD Actuals	2019-20 Revised Budget	2019-20 YTD Actuals	2020-21 Revised Budget	2020-21 YTD Actuals	2021-22 YTD Actuals	2021-22 Budget
▶ Revenues	\$ 2,360,915	\$ 2,505,576	\$ 1,470,715	\$ 0	\$ 1,622,066	\$ 668,385	\$ 2,910,675
▶ Expenses	2,141,386	2,583,806	1,067,411	1,867,808	1,805,755	971,497	2,393,251
Revenues Less Expenses	\$ 219,529	\$ -78,231	\$ 403,304	\$ -1,867,808	\$ -183,689	\$ -303,113	\$ 517,424

Recent Developments

In Fiscal year 2021 the Food Services Department, due to the Global pandemic is adjusting its meals service program and is no longer operating the National School Lunch program but is operating under the Seamless Summer Option. This is made possible due to a National Waiver in response to COVID at the beginning of the school closures in March 2020. This waiver is extended through end of School Year, June 2021.

The Seamless Summer Option Waiver allows schools in non-Area Eligible School Districts (areas with 50 percent or higher students qualifying for Free/Reduced Meals) to serve Universally Free Meals to all students enrolled in the district as well as any child 0 -18 who wishes to participate. Brookline Food Service for the first year is eligible to participate and have an opportunity to serve meals to all participants in the program. This opportunity is allowing the department to receive \$ 3.635 per lunch and \$2.26 per breakfast served. The department has a unique opportunity to maximize its federal revenue by increasing the total number of meals served allowing the department to balance its budget this year.

In Fiscal year 2022 the department plans to return to normal operation under the National School Lunch and Breakfast Programs until we receive further guidance from the department of Education. A plan for how the program will operate in FY22 will have severe impact the Budget as this will determine the types of revenue the department receive.

Current Challenges

Fiscal year 22 will continue to be plagued with some of the same challenges we faced in 2021 as we seek to operate the program post pandemic.

The department is operating under unconventional school meals services as we move service from the cafeteria to unconventional locations such as parks, parking lots, as well as home deliveries and mobile delivery services. One challenge as a result of these meal delivery services is the need for additional larger delivery van to transport products safely to all schools. This will continue as we seek to centralize some services a method that work well during the 2021 fiscal year.

Food cost in fiscal year 2021 has risen to over 4 percent partly driven by supply and demand as well as the purchasing of food items that are not typically purchased in food services. The department will continue to participate in the collaborative to maximize our purchasing power to help minimize the impact of the rising cost of food.

The need for individually packaged items has significantly increased the cost of supplies as items purchased in bulk are then individually packaged for distribution. This also poses a challenge to the department's commitment to sustainability through composting, recycling and reusing in an attempt to reduce waste. Meals once served in compostable or reusable trays are now being wrapped or packaged individually and distributed outside of the cafeteria. The department is anticipating a continuation repackaging of some items Fiscal year 2022 as we anticipate that some of the current guidelines or recommendations will remain in place.

Another significant challenge is the high labor cost which along with food continues to be amounts to approximately 85 percent of the department's budget.

The department will be implementing many components of the newly installed software that will help the department operate at greater efficiency. This will centralize many aspects of the program which will help to reduce labor and waste and allow for greater accountability.

Significant Proposed Changes for the Upcoming Fiscal Year and Budget Impact

The department will continue to monitor USDA guidelines and the future of the National School Lunch and National School Breakfast Programs. Most Schools across the nation has a rare chance to see the pro and cons of operating a Universally Free School Meals Program. The benefits of this type of program both financially is based on the department's participation rate, higher participation equals greater revenue. A Universally Free Program makes school lunch equitable and removes the stigma associated with school meals. Guidelines regarding the operation of the program are dependent on the guidelines from the United States Department of agriculture.

Stakeholders have been advocating for years for a Universally Free School Meals Nationally. School Year 2021 was great opportunity to analyze the pros and cons of such program as most schools nationwide are operating a Universally Free School Meals Program. A decision to continue this program would have significant impact on the upcoming year's fiscal budget.

Fiscal year 2021 was a great indication of the huge benefit a Universal Free school Lunch Program would have on the Brookline School Food Services Department. While it is too early to determine the overall impact, early data shows the department operating a balanced budget through the 2020 school year.

National data suggests that there are financial advantages to operating the Community eligibility Provision which is similar to a Universally Free Program with significant difference in how reimbursement rates are calculated. The department will continue to join other stakeholders in advocating for Universally Free School Meal Programs.

On the Horizon

- The department is looking to focus on building a financially self-sustaining, sustainable program.
- Continued focus on local sourcing through partnerships with hyper local vendor in order to reduce the department carbon footprint.
- Reduce food and other waste and continue the transition to reusable wares in compatible kitchens.
- The department in partnership with teacher and other stakeholder groups has applied and will continue to apply for grants associated with Farm to School, sustainability, and food insecurities to be used to help achieve our commitment to sustainability and food security in the district.