

AREA I. Focus fiscal decisions on strategic goals, not departments or programs

1. Our school (or district) clarifies budget imperatives and priorities first

- not at all
- somewhat
- moderately so
- very much so

2. Our school (or district) determines how or if proposed budget changes align with our strategic plan to meet student performance goals

- not at all
- somewhat
- moderately so
- very much so

3. Our school (or district) creates a collaborative, cross functional team that determines priorities together to prevent fiefdoms or fragmented decision-making structures tied to revenue streams

- not at all
- somewhat
- moderately so
- very much so

4. Our school (or district) concentrates on decisions that are of the same grain size in order to prioritize those that create big shifts in resource allocation

- not at all
- somewhat
- moderately so
- very much so

5. Our school (or district) uses previous budget as reference, rather than default, as we start with our goals and make our budget work to achieve those goals in the current year

- not at all
- somewhat
- moderately so
- very much so

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AREA II. Include all funds for consideration

6. Our school (or district) integrates restricted funds allocation processes and timelines when possible, which includes working off of estimates and then revising as grant revenue becomes known

- not at all
- somewhat
- moderately so
- very much so

7. Our school (or district) integrates all funds in the budget process and aligns them around other resource-related decisions such as compensation, staffing, technology and instructional material acquisition

- not at all
- somewhat
- moderately so
- very much so

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AREA III. Integrate stakeholder perspective in fiscal decision-making

8. At a minimum, our school (or district) includes teachers, school leaders and key community members in designing financial plans

- not at all
- somewhat
- moderately so
- very much so

9. Our school (or district) includes follow-up meetings and communication to show engaged stakeholders what their feedback was, how it was considered in the process, and leadership's final decisions--teacher leaders, principals, superintendent, school board

- not at all
- somewhat
- moderately so
- very much so

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AREA IV. Ensure budgeting process and fiscal management tools enable ROI comparisons

10. Our school (or district) considers cost per unit and quality of service in fiscal decision making, but not to the exclusion of other measures of quality or effectiveness

- not at all
- somewhat
- moderately so
- very much so

11. Our school (or district) includes multi-year considerations in its fiscal decision-making. This includes valuing investments for the future appropriately (e.g., raising questions of sustainable maintenance; need for required professional development).

- not at all
- somewhat
- moderately so
- very much so

12. Our school (or district) considers the full picture of ROI (Return on Investment) comparisons. We continually reflect on new and ongoing investments

- not at all
- somewhat
- moderately so
- very much so

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AREA V. Balance budgeted expenses with revenue

13. By the end of the process, our school (or district) incorporates all general-ledger level budgets into the financial system

- not at all
- somewhat
- moderately so
- very much so

14. Our school (or district) considers the impact of proposed expenses against forecasted fiscal resources in future years

- not at all
- somewhat
- moderately so
- very much so

15. Our school (or district) is strategic about adding to or using reserve funds based upon specific annual conditions and circumstances

- not at all
- somewhat
- moderately so
- very much so

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AREA VI. Make all investments and reallocations strategically coherent and implementable

16. Our school (or district) is committed to making investments focused and deep versus broad and narrow. We limit the quantity of changes to that which we can carry out well

- not at all
- somewhat
- moderately so
- very much so

17. Our school (or district) explicitly considers the capacity of its school leaders to manage change and to effectively implement planned activities during fiscal decision-making processes

- not at all
- somewhat
- moderately so
- very much so

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AREA VII. Manage uncertainty: Investments and cuts are prioritized and mapped to potential levels

18. If the revenue mark for our school (or district) falls below request levels, we are able to minimize the need to start a whole new process by deciding the priority of operational changes in advance

- not at all
- somewhat
- moderately so
- very much so

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AREA VIII. Set up ability to monitor and respond to investment results to ensure sustainability

19. At our school (or district) we are able to feed decisions directly into the school budget development process, including plans for monitoring and school leadership support

- not at all
- somewhat
- moderately so
- very much so

20. As part of the budget development process, we know that our school (or district) can monitor key investments and reallocations in terms of costs (are the schools on budget?), implementation (are the schools executing what was intended?), and performance (are the schools achieving the student outcomes intended?)

- our school (or district) cannot do this at all
- our school (or district) can do this somewhat
- our school (or district) can do this moderately well
- our school (or district) can do this very well

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