





CFO & Team Principal Support Framework

How can the finance & budgeting teams best support principals to be strategic and transformational?

Levers	Data/ Reports	Process	Policies/ Accountabilities	Tools	Expertise/ Support
Description	Concrete numbers and reports provided to principals.	How principals engage with the budget and finance offices.	Rules principals must follow and boundaries they must adhere to.	What the budget team provides principals to use to complete their budget process.	How the budget team supports principals and builds their capacity.
Efficient  Strategic 	The Right Information at the Right Time Data and reports have accurate, school-specific information (e.g. budget projections, enrollment). They are provided to principals in a timely manner.	Clear and Understood The budgeting process is clearly communicated, well understood, and easy for principals to follow (e.g., A user-friendly online one-stop-shop). The timeline allows principals to finish on time without being rushed.	Limited to Requirements Policies are clearly communicated and well understood by principals. There is a focus on meeting “must do” requirements, primarily for external compliance purposes. Ideally kept to a minimum.	User-Friendly Principals are provided easy-to-use, straightforward tools to support their budgeting process. Tools help principals balance budgets and comply with all requirements.	Budget, Accounting & Compliance Focused Principals receive effective support on how to balance budgets and comply with all requirements. Budget staff are responsive and knowledgeable about the full process, compliance requirements & deadlines.
	Benchmark Against Best Practices Reports and data not only accurately show the specific school data, but also display best practices and benchmarks for the principal to use to compare performance and school designs and set goals.	Design & Needs Driven School budget development is fully integrated into broader school planning process. Provides sufficient time for principals to consider tradeoffs and engage thoughtfully with the budget office. Results in schools reflecting on outcomes, needs and constraints in order to develop resource requirements. Reinforces continuous improvement.	Aligned with School Accountability System Policies actively integrate budgeting with school planning. Resource flexibilities are significant and aligned with district’s school accountability system (available to all schools, earned by performance, etc.)	Push Thinking Tools are not only user-friendly and accurate, but they are designed to provide principals feedback on their choices and best practice alternatives, given their unique circumstances and budgets. Principals find them helpful in making strategic decisions.	School Design Focused Principals receive support that is solution-focused and driven by their school needs. Budget staff work cross-functionally (esp with HR, Academics & SPED) to provide resource strategies that best meet the needs of the school.

