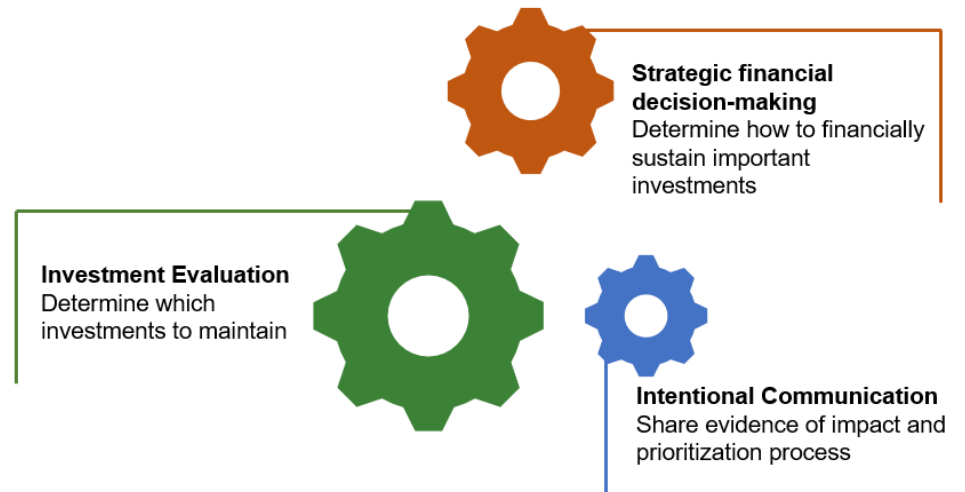


# Strategic Use of Funds Coaching Tool

The purpose of this tool is to help local education agency (LEA) leaders plan for communicating their priorities and the impact of their investments.



As shown in the graphic above, intentional communication is an essential component of planning for sustainability, along with investment evaluation and strategic financial decision-making. Each set of questions on the following pages is a step in the LEA investment communication process. This guide is designed to be used after LEAs have conducted an evaluation on the impact of their investments and considered the financial sustainability of those investments.

There are three steps to preparing for intentional communication: a strategic scan, content, and delivery methods.



The Strategic Scan questions will help LEAs conduct a preliminary internal scan of the needs that they might address and potential data requirements. The Content section will help LEAs determine *what* aspects to communicate about the investment decision, and the Delivery Methods section will help LEAs determine *how* they will communicate their decision.

## Strategic Scan

*Spend no more than 15 minutes on this section.*

**What information do we have?**

**What are the gaps in performance?**

**What strategies and programs are already in place to achieve long-term sustainability?**

**What are some ways that we are considering communicating decisions?**

**Who is our target audience?**

**What data might we use?**

## Content

*The estimated time to complete is 20 minutes. These questions should be completed after priorities and investment decisions have been determined.*

**What information does our community need to know?**

**What types of evidence can we present on student impact of our investments?**

**What types of evidence can we present on the financial implications of our decision-making?**

**What types of evidence can we present on community support for these investments?**

**What do community members already understand about these investments?**

**What misconceptions might they have about school investments or the budgeting process?**

## Delivery Methods

*The estimated time to complete is 30 minutes. These questions should be completed after the Content section has been completed.*

**What is the most effective way to transmit this information to our community?**

**What existing venues can we utilize to communicate our message? How can we leverage existing popular communication tools?**

**What forms of communication are we using? Visual? Audio? Large group? Small group?**

**What translation services do we need to make sure our materials can be accessed by the community?**

**What types of visualizations can we use?**

**Do the visualizations communicate the key takeaway points?**

**Can the visuals be digested in 30 seconds or less?**

**Are they readable by all audiences? (Consider font size and layout)**

**Do the speakers represent the community? (Consider each speaker's gender, race, age, and community of origin)**

**How long are the different speakers speaking?**

**For in-person approaches: What is the layout of the room?**

**For-in person approaches: Is the layout inviting to all? (Consider the size and arrangement of tables and chairs, heating and cooling, room size, and room acoustics)**