

## Communicating School Finances

MASBO Institute of School  
Business Management  
February 23, 2010

## Communicating School Finances - Agenda

- Introduction
- What makes a good speaker?
- Types of communication
- Knowing your audience
- Knowing your message
- Getting the message across
- The message itself
- The conclusion
- Seven deadly sins of budget communication
- Small group discussion
- Example presentations
- Questions and answers

## Communicating School Finances

- You mean I have to get up and say something in front of people?
- That's not my job!



## Communicating School Finances – *It is our job*

- Remember the business we are in
- We are all about teaching and learning
  - Part of the school officials role is to “teach” school finances to a variety of customers
- Presenting isn't just about updating the school finances
  - It is about providing financial updates to assist in providing educational opportunities for students with the resources that we have.

## Communicating School Finances – *It is our job (cont)*

- Explaining a multi-million dollar budget, highly regulated by state and federal mandates, calls for
  - Multiple messages
  - Using multiple media
  - Delivered through as many venues as possible

## What Makes a Good Speaker?

- ALWAYS be honest, truthful, ethical, open and sincere have respect for the community
- Build trust in everything you do so that when you talk about finances, your audience trusts you to be telling it straight
- Avoid jargon and acronyms
- Don't talk about what you think. Talk about what you know
- Be an active listener
  - Reframe their key points: “Let me be sure that I understand you correctly, you are saying...”

## What Makes a Good Speaker? (cont.)

- Respect the audience and practice compassion
  - Walk in their shoes (i.e. My son rides the same bus)
- Be positive and up beat
- Accept the responsibility and the consequences
- Knowledge
- Self confidence
- Enthusiasm
- Preparation
- Clear message



## Types of Communication

- Written Reports
- Oral Presentations
- Interviews



## Written Reports

- Provide narrative, graphical and detailed financial analysis
- Examples
  - Annual Audit
  - Monthly Treasurer's Report
  - Annual Budget Document
  - Newsletters, newspaper columns
  - Web sites

## Oral Reports

- Provide summary information with graphical analysis
- Examples
  - Face to face meetings
  - School board presentations
  - Truth in Taxation hearings
  - Site staff presentations
  - Levy information presentations-to the community

## Interviews

- School Newspapers
- Local and Regional Newspapers
- Local TV/Cable Stations



## Know Your Audience

- Who are you trying to reach? Who needs to know?
  - Board, staff, business community, parents, tax payers, legislators, or Yes/No groups
- What do they all ready know?
- What do they need to know?
- What do they want to know?
- What do you want them to know?
- When do they need to know?
- The tax payers 1<sup>st</sup> question, How does it affect ME?



## Know Your Audience (Cont.)

- Talk with someone in advance of the presentation
- Ask about specific questions or issues
- Know what they want and give it to them
- Tailor the financial information to the group or individual.

## Know Your Message

- Determine your key points
  - What are the three "take aways" you want the audience to leave with
- Make your points simple, strong and memorable
- Repeat, repeat, repeat
  - Maintain focus on key points
- Example of key points from Hopkins
  - The "Three R's"
    - Restoring – the district's financial stability
    - Renewing – trust
    - Refocusing – the district on the education of students

## Know Your Message (Cont.)

- Build an effective message
- Focus on the benefits to your audience
- Emphasize what is important
- Anticipate questions and build in answer into your presentation
- Have supporting data when necessary

## Know Your Message (Cont.)

- Be prepared, learn your lines
- Rehearse so you are comfortable with the message
  - If you are presenting with someone, rehearse together
- Practice out loud or video tape yourself
- Be confident and comfortable
- Make good eye contact
- Speak slowly and clearly
- Relax
- Enjoy the experience



## Getting Your Message Across

- Put your main points up front
- Organize logically
- Be accurate
- Keep the message simple. Too much overwhelms
- Focus on connecting not just communicating
- Presentation is important, it increases the impact of your message
- Always show if you can, never just tell

## Getting Your Message Across (Cont.)

- Prepare for the tough questions
  - Repeat each question asked
  - Do not become defensive
  - Be accurate – no faking
- Take control...the question is theirs but the answer is yours
  - Restate negative into a positive
- Avoid long, drawn out rambling answers that go nowhere
  - If the question requires a detailed answer take the persons name and phone number and respond back to them at a later time



## Getting Your Message Across (Cont.)

- Always select typeface that is readable
- Use plenty of white space
- Photos and graphics are good but don't go overboard
  - Visual aids should reinforce ideas and main points
- Use multi-media sources radio, cable TV and newspapers
- Develop and use your district web page

## Getting Your Message Across (Cont.)

- Managing Conflict
  - Involve major stake holders in small group discussions
  - Include others in the process and foster good key communicators in the community
  - Open dialogue builds trust and understanding

## The Communications Team

- Develop good working relationships with your Superintendent, Board, communications staff, and other administrators and the community
- Showcase district expertise (curriculum, human resources, community services, etc.)
  - Makes everyone look good

## The Message Itself

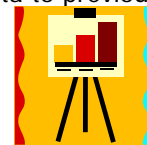
- Describe the purpose of the presentation
- Tie it to the district's mission statement
- Outline the goals and objectives to be accomplished
- Have a timeline if appropriate
- Give the financial components
- Include more than just numbers

## The Message Itself (Cont.)

- Use plain english
- Include descriptions of the process
  - Tell who, what and explain why
- Use examples when you can
- Use comparisons where applicable
  - Past to present
  - Adopted to revised budget
  - Budget to actual

## The Message Itself (Cont.)

- Show gaps between current status and desired goals (i.e fund balance)
- Don't be afraid to talk about mid course adjustments that must be worked through
- Compare data to previous reports



## The Message Itself (Cont.)

Talk about forces that impact the numbers

- Historical trends
- Events and people
- Political and social factors
- Environmental concerns
- Community expectations
- State and Federal demands
- Enrollment growth/decline
- Teacher shortages
- Collective bargaining issues

## Conclusion

- Summarize the information
- Emphasize key messages
  - Changing trends
  - Impact on the future
- Audience satisfaction
  - Got the information the needed
  - Got their questions answered
  - Know how to keep informed in the future



## The 7 Deadly Sins of Budget Communications and How to Repent

Ed Moore, APR NSPRA Resource Files

- Pontification
  - Offer access. Be approachable. Make messages simple and personal. Keep the focus on local – on students and learning
- Puffery
  - Economize on words first. Ban jargon. Say “textbooks” and “software” instead of “instructional materials”.
- Insincerity
  - Be transparent. Talk straight and forthright. Follow through on warnings of cuts. False threats return to haunt and destroy credibility.

## The 7 Deadly Sins of Budget Communications and How to Repent

Ed Moore, APR NSPRA Resource Files

- Disorder
  - Create context for messages. Keep it real. Bring issues home for people. Relate on their terms.
- Boredom
  - Excite people. Paint pictures for them. Help them visualize what can be.
- Paralysis
  - Tap existing strengths. Use key communicators. Draw on public relations investments already banked.
- Complacency
  - Visualize the future. Engage people. Commit to public relations and ongoing communication.

## Discussion

- Small group – Exercise
  - What experiences have you had with communication of school finances?
    - Share positive or difficult communications and how you handled them
    - Share your tips for positive communication or the “deadly sins” to avoid
  - Your district is headed toward SOD – how would you communicate to the public the plan to move the district in a positive financial direction?
- Questions, comments and feedback

## Example Presentations

- Budget Documents
  - Excel, Word, Powerpoint
- Budget Brochure
- Website Information
- Long Range Planning