State Report Card and School Financial Community Presentation Toolkit

Facilitator Guide

November 2022

Toolkit Overview

Holding a community presentation gives you an opportunity to build transparency and engage the community in important information that is vital to the health of your district. This presentation toolkit will allow you to tell your story and explain how important decisions are being made. The toolkit materials use real data to explain the current status of multiple programs and structures within your district and give you a chance to discuss how you are planning for equity in your schools.

These materials provide general information and a structure for the conversation, but they also allow for customization of details in your local context. The materials use sample data and images that you can replace to personalize the information for your district. See the note at the bottom of this document regarding modifications to the materials.

We recommend that you present the information in a way that is easily accessible for the audience. Consider the best way to deliver the information. For example, consider the appropriate channels and dissemination methods to reach a broad, diverse audience. We encourage posting materials on the district's website.

Materials

The toolkit includes the following materials:

- State Report Card and School Financial Community Toolkit Facilitator Guide

- State Report Card and School Financial Community Presentation Template

- Frequently Asked Questions About Public School Finance and the Every Student Succeeds Act

Toolkit Objectives

- Provide local background information.

- Summarize and explain elements of the State School Report Card.

- Summarize and explain local and state financial information.

- Summarize and explain special circumstances specific to the local district.

- Provide opportunities for additional information and feedback.

Presentation Guide

The State Report Card and School Financial Community Presentation Template provides you with a meeting structure to directly communicate pertinent information to the audience. We designed the presentation template to be inclusive and accessible to incorporate all the diversity in your district. We intentionally included equity considerations throughout the presentation to ensure all groups are considered and all audiences are included.. We ask you to pay special attention to the notes section within the presentation slide deck, where we included numerous considerations, questions, and reminders related to equity.

Intended Audience

Stakeholders who would benefit from this toolkit may include parents, community members, or district faculty and staff.

Presentation Checklists

Exhibit 1 provides an initial starting point for planning in-person meetings. Exhibit 2 provides a planning checklist for virtual meetings. These lists are not comprehensive, so we included additional lines in the exhibits to add district-specific context as needed.

Exhibit 1. In-Person Meeting Planning Checklist

	Before event *(We recommend completing these tasks within 2 weeks leading up to the event.)*	Person responsible
☐	Ensure venue is accessible for attendees covered by the Americans with Disabilities Act.	
☐	Ensure all facility entrances and exits are clear for emergencies.	
☐	Ensure custodial support staff will be on-site for the event.	
☐	Ensure ample and comfortable seating and visibility.	
☐	Consider providing childcare for attendees.	
☐	Consider providing refreshments, food, or drinks.	
☐	Ensure security support staff will be on-site.	
☐	Schedule students to welcome attendees.	
☐	Arrange back-up venue in case of emergencies.	
☐	Prepare first aid kits.	
☐	Ensure automated external defibrillator (AED) devices are accessible and functional.	
☐	Ensure fire extinguishers are accessible and charged.	
☐	Prepare sign-in sheet for attendees.	
☐	Prepare any handouts for attendees.	
☐	Prepare any give-away items for attendees.	
☐	Consider question box for attendees to leave questions.	
☐	Consider interpreter or translator for message.	
☐	Consider sign language presenter for message.	
☐	Consider having all district principals in attendance.	
☐	Consider any special decorations, banners, or graphics.	
☐	Prepare directional signs for attendees.	
☐	Send out location information and transportation options.	
☐	Send out event information, including a tentative agenda.	
☐	Confirm venue reservation with building principal or external facility.	
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Day of event *(We recommend completing these tasks 1 or 2 hours prior to the event.)*	Person responsible
☐ Open facility doors an hour prior to the event.	
☐ Ensure parking space is adequate and clear of ice.	
☐ Ensure lighting in presentation room is adequate.	
☐ Ensure room temperature is comfortable.	
☐ Ensure all facility exits are clear for emergencies.	
☐ Clean all facilities and restrooms.	
☐ Ensure sidewalks and all walkways are clear of ice.	
☐ Eliminate background noise in venue area.	
☐ Ensure all school personnel are aware of the presentation event.	
☐ Send out reminder email about event.	
☐ Post directional signs pointing attendees to location of event.	
☐ Set up welcome table with sign-in sheets, name tags, and any handouts or other items.	
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After event *(We recommend completing these tasks immediately after the event.)*	Person responsible
☐ Clean up venue (e.g., chairs, tables).	
☐ Consult with district office about how best to support reflection and evaluation requests (e.g., email, phone call).	
☐ Send out reflection and evaluation requests to attendees.	
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Exhibit 2. Virtual Meeting Planning Checklist

	Before event *(We recommend completing these tasks within 2 weeks leading up to the event.)*	Person responsible
☐	Choose appropriate virtual meeting platform and ensure all licenses and permissions are in place.	
☐	Arrange back-up platform in case of emergencies.	
☐	Prepare method for tracking attendance.	
☐	Prepare any handouts for attendees.	
☐	Consider chat or Q & A feature for attendees to ask questions.	
☐	Consider interpreter or translator for message.	
☐	Consider closed-captioning options.	
☐	Consider having all district principals in attendance.	
☐	Send out event information, including a tentative agenda.	
☐	Consider arranging for a non-presenting individual to handle meeting logistics.	
☐	Consider arranging for recording of the meeting.	
☐	Plan strategy for addressing audience questions.	
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Day of event *(We recommend completing these tasks an hour or two prior to the event.)*	Person responsible
☐ Eliminate background noise in presentation area.	
☐ Ensure presenter's background is appropriate for on-camera use.	
☐ Send out reminder email about event.	
☐ Email or otherwise make available and any handouts or other items.	
☐ Test presenter's internet connectivity.	
☐ Test presenter's camera and microphone.	
☐ Load all presentation materials to presenter's computer.	
☐ Ensure the presentation has a message informing attendees that the webinar is being recorded (if applicable).	
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After event *(We recommend completing these tasks immediately after the event.)*	Person responsible
☐ Consult with district office about how best to support reflection and evaluation requests (e.g., email, phone call).	
☐ Send out reflection and evaluation requests to attendees.	
☐ Post meeting recording on district website.	
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Presentation Agenda Outline

Exhibit 3 provides a detailed outline of an agenda for a presentation. The agenda includes timing, slide numbers, and the corresponding activities. The design is meant to be flexible. Please pick and choose elements of the presentation based on your needs.

Exhibit 3. Detailed Outline of the Agenda

Agenda item	Time	Slides	Activities
Section 1: Opening Information	5–10 minutes	1–6	• Highlight celebrations and personalize any recent local successes. Tell your story! • Articulate the philosophy of the current school board and district leadership. • Provide any necessary local background information.
Section 2: School Report Card Information	20–40 minutes	7–18	• Define common terms in the State Report Card. • Describe student demographics and subgroup populations. • Describe teacher demographics. • Explain different tier designations of performance. • Detail significant historical trends in state designations. • Summarize academic progress and student achievement. • Summarize student subgroups and achievement gaps. • Summarize student graduation rates and historical trends data (for high schools). • Detail performance comparisons between schools within the district. • Detail performance comparisons between neighboring and state school districts.

Agenda item	Time	Slides	Activities
Section 3: Financial Information	20–40 minutes	19–34	• Define common financial terms. • Describe annual budget and tax levy timeline and process. • Provide the financial profile rating of the district and historical trends. • Identify district and school adequacy targets and financial capacity levels. • Identify different operating funds, requirements, and limitations of use. • Provide district fund balances and recent trends of significance. • Summarize revenue sources, amounts, and recent significant trends. • Discuss the influx of funds from the Elementary and Secondary School Emergency Relief Fund. • Summarize district and school expenditures, amounts, and significant trends. • Describe typical drivers of school spending and variations. • Describe dimensions of resource equity.
Section 4: Special Circumstances (if applicable)	10–20 minutes	35–41	• Describe recent state mandates and legislation that will have a significant impact on districts. • Describe current or planned health-life-safety and construction projects. • Describe significant or anticipated changes to enrollment information. • Discuss district consolidation, reorganizing, or redistricting boundaries. • Describe current or upcoming referendum projects in the district. • Provide the purpose of the annual financial report, location of the report, and findings.
Section 5: Closing Information	5–10 minutes	42–46	• Discuss opportunities for growth that the district is planning. • Discuss opportunities for the audience to provide input and feedback to the district. • Discuss the frequently asked questions document available on the website.

Partnership and Authorship

The *State Report Card and School Financial Community Presentation Toolkit* was developed through a partnership between the Region 9 Comprehensive Center and the Illinois State Board of Education. We would like to thank the West 40 Intermediate Service Center; the State Support Network; and a group of superintendents and business managers, including Scott Beranek, Janiece Jackson, Mary Havis, Stephanie Palmer, Dave Palzet, Nicolas Wade, and James Vreeland, for providing expertise and facilitation support to develop this resource.

Note on Adapting the Materials

The materials are designed so that facilitators can adopt them as written or modify the content to reflect local context, needs, and priorities. If modifications to content are made, we request that the following disclaimer be included on the revised materials: **These materials have been adapted in whole or in part with permission from The Region 9 Comprehensive Center and the Illinois State Board of Education.**

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