Aligning Funding to Action to Accelerate Impact: A Fiscal Mapping Toolkit

JOBS FOR THE FUTURE

THIS TOOLKIT WAS JOINTLY CREATED FOR JOBS FOR THE FUTURE BY COLLABORATIVE COMMUNICATIONS AND THE FORUM FOR YOUTH INVESTMENT
WE WOULD LIKE TO CREDIT THE PLACE-BASED INITIATIVE (PBI) AND PERFORMANCE PARTNERSHIP PILOT (P3) CONTRACT FOR PROVIDING THE RESOURCES THAT MADE THIS TOOLKIT POSSIBLE.

BACKGROUND

Communities across the country all have big picture goals for children, youth, and families that include: mental, physical, and emotional well-being; adequate nutrition; academic achievement; workforce readiness; civic engagement; and stable housing. Too often, local leaders address broad goals through single issue programs and interventions because they need programs that fit the funding instead of designing comprehensive solutions that actually meet these needs. This fiscal mapping toolkit, which includes templates, worksheets, and presentations, helps leaders begin to shift the paradigm to build a funding strategy that supports comprehensive and strategic action to catalyze impact.

A fiscal map, or an accounting of funds that a community can leverage to achieve big picture goals, can serve as the key to shifting the paradigm. Fiscal maps help local leaders understand the extent of resources available in their community, identify service gaps, and coordinate public and private funds to create greater impact. This process can serve as a powerful engagement tool to bring a cross-section of stakeholders to the table and understand how to work toward shared goals.

About the Toolkit

These resources have been developed and road-tested with a community of practice that included eight, place-based urban, suburban, and rural Promise Zone and P3 communities from across the country. The Department of Education's Place-Based and P3 initiative has provided communities with flexibility around how they use funds to advance shared goals. As noted before, a fiscal map enables each of these communities to maximize that flexibility, identifying and aligning both existing and new funding streams to amplify their impact.

Jobs for the Future, in conjunction with Collaborative Communications and the Forum for Youth Investment, have offered a mix of in-person and virtual technical assistance to communities nationwide that focused on the development of a best practice informed fiscal mapping process.

Resources in the toolkit include tools and templates that communities can use to jump-start their own fiscal mapping processes, including:

- **An introductory list of readiness questions** that communities can use to determine their capacity for a fiscal mapping process.
- **Worksheets** on planning a fiscal mapping process, engaging stakeholders and experts, and collecting and analyzing data.
- **A fiscal mapping project plan template.**
- **A sample data collection template.**
- **Three case studies** that highlight the potential of flexible financing structures—and spotlight two communities that have used them to serve disconnected youth.

Along with our federal fiscal mapping tool, guide, and accompanying resources, local leaders can use this toolkit as a starting point in the effort to coordinate and better align resources across multiple agencies, programs and services.

For information or questions about this toolkit, contact Lucretia Murphy at lmurphy@jff.org.

TOOL 1

Readiness Questions

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FISCAL MAPPING PROJECT

OVERVIEW

An increasing number of communities have embarked on fiscal mapping processes to establish core outcomes for their community--and identify the funding strategies and resources that can support progress toward those outcomes. A fiscal map is an accounting of the funds supporting specific outcomes, services, interventions, or populations. A fiscal map shows where these funds originate, where the funds are directed, and who the funds ultimately serve. It can be a useful tool to show resources currently available, and gaps in being able to fully fund programs or initiatives. Communities that have completed fiscal maps have used them to better align funding to shared goals, to more effectively coordinate and secure resources, and as an impetus to move from funding programs to funding outcomes.

In our experience, communities ready to undertake a fiscal mapping process demonstrate the following:

- A committed team of cross-sector partners that are actively engaged in your community's work and a smaller core team interested in fiscal mapping.
- A vision that articulates clear outcomes or results that your community is committed to (i.e. all youth succeed in school, all youth are civically engaged, all children are physically safe).
- An interest in implementing strategic financing strategies such as: blending and braiding multiple funding streams, seeking administrative waivers, and pooling funds to better meet community needs.

These questions can help your community determine if it is ready to pursue a fiscal mapping process:

1. Who are the cross-sector partners and agencies actively engaged in your work to improve outcomes for children and youth? What programs, initiatives, and services are you providing or planning to provide?
2. What discussion has this core group had about mapping out funding streams? Have you discussed topics such as blending and braiding, administrative waivers, pooling funds, or other, similar financing strategies? Have you developed or begun to develop a strategic financing or resource development plan?
3. Do members of your core team understand your community's budget process, federal and state funding processes, and the strategic plan for children and youth?
4. What shared outcomes has your community identified for its children and disconnected youth?
5. What challenges, beyond needing additional financial resources, has your community identified to meeting these outcomes?
6. What does your community hope to gain from a fiscal mapping process?
   - ☐ Understand current investments
   - ☐ Align goals and resources
   - ☐ Coordinate supports and services
   - ☐ Maximize funding opportunities
   - ☐ Identify new areas for attention, efficiency, and innovation
   - ☐ Create a more collaborative approach to seeking and using resources

TOOL 2

Determining Scope and Scale

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FISCAL MAPPING PROJECT

OVERVIEW

Use this worksheet to kick-start your fiscal mapping process and determine the scale and scope of your research. Sample entries are provided for some of the questions here to guide your work.

Goals and Target Audience for Fiscal Map

How do you plan to use the fiscal mapping study results? (check all that apply)

- ☐ Maximize funding opportunities for a specific service, support, outcome or impact area or age group (if yes, provide specifics)

  ____
- ☐ Support education or advocacy efforts around equitable access or quality of services and supports
- ☐ Develop additional resources or tools to help stakeholders understand amount or impact of investments
- ☐ Create opportunities to build relationships with community leaders, legislators, and funders
- ☐ Review/balance portfolio of investments
- ☐ Coordinate supports and services to improve/ increase outcomes and impacts

Who are the target audiences for the study? (check all that apply)

- ☐ Policymakers
- ☐ Members of the public
- ☐ Service providers and community based agencies/organizations
- ☐ Private funders
- ☐ Business leaders and those influential in the community

What will be the scope of your fiscal mapping study?

Supports and services included:
EXAMPLE: All services affecting disconnected youth

____

Geography (city, county, municipal district):
EXAMPLE: City of LA

____

Federal, state, local and/or private funds:

____

Outcome or impact areas studied:

____

Age range of those receiving services and supports:

____

On what time period will you focus your data collection?

Calendar year?

____

State fiscal year? (specify time span):
EXAMPLE: July 1, 2016 to June 30, 2017

____

Federal fiscal year? (October – September)

____

Other? (specify):

____

Stakeholder Selection Rubric

OVERVIEW

The next step in the fiscal mapping process is to identify a core group of staff, key stakeholders, and experts who will assist in the effort.

First, the community partners should name a project manager to direct and manage the fiscal mapping work. The project manager will set meeting agendas, manage the project timeline, aggregate data and information, manage document version control, ensure the work is aligned with overarching goals, and be a single point of contact for the project.

Additionally, a community may choose to form an advisory group comprised of key leaders and stakeholders that set the table for a successful process. Some communities chose to collect and analyze data with the assistance of work groups or subcommittees with expertise in particular service or goal areas.

This rubric provides a place to record decisions made about who to involve in the fiscal mapping project, and when to involve them. In the following rubric, we also outline how this tool could be used.

Stakeholder Selection Rubric

WHO	WHEN TO ENGAGE: Determine Fiscal Mapping Goals	Design the Study Approach	Collect Data	Analyze Data	Communicate Results
Project Manager or Staff Liaison Coordinates planning and research work for each entity					
Advisory Group A high-level group that addresses key questions about research parameters & is most useful at the beginning of a process	✓				
Working Group Individuals who meet regularly throughout the mapping process and help guide the research		✓		✓	✓
Consultant A research center, university, or consultant hired to conduct the fiscal mapping study, spearhead data collection and analysis, and write the final report					
Additional Expertise					
Has knowledge of funding streams & how they flow in the community NAME & ORG:					
Can access data on spending NAME & ORG: State Office of Management and Budget			✓		
Can help in understanding spending figures NAME & ORG:					
Understands community needs & concerns, can help put data in context NAME & ORG:					
Influences how public or private resources are spent NAME & ORG:					

Adapted from: *Follow the Money—A Tool for Mapping Funds for Out-of School Time Initiatives,* The Finance Project, November 2009

Setting Parameters

OVERVIEW

It is critical to set parameters for your fiscal mapping process. These parameters will be defined by a set of goals that include: the purposes of the fiscal scan, the populations to be included, departments and service areas that are the focus of the project, which of these service areas are of the highest priority to map, and whether the project will include city, state, federal, and/or private sources of funding.

Questions for discussion should include:

- Which populations will this fiscal map cover (age, income status, population characteristics)?
- What types of programs will this fiscal map identify?
- What are the developmental areas of focus that this fiscal map will identify?
- Which funding categories will be captured in this scan?
- What types of services or service settings will be included in this scan?

You may already have the answers to some of these questions based on previous discussion and/or local circumstances. Others may require more discussion among your core stakeholder groups to ensure that the scan meets its intended purposes. This worksheet outlines key questions and considerations that will help you shape and define the parameters of the scan.

Demographics

<table>
<tr><th>Key Question</th><th>Example Parameters</th><th>Considerations</th></tr>
<tr><td>What target ages or groups should this fiscal management project capture?</td><td>Elementary, Middle, High School,

Age ranges 8 – 12, 13 – 15, 16 – 18, 18 – 20, 21 – 24</td><td>■ Current funding may align to a particular age span. If there is agreement among entities and agencies about the upper and lower bounds of the age spread under consideration, use those parameters.

■ There are trade-offs between using age (8 – 12) vs. stage (middle school) to frame the fiscal mapping work. Discuss which of these best serve the purposes of the scan.

▸ An age frame may illustrate population eligibility for programs and funding streams—regardless of whether school status “fits” age—but age range cutoffs may vary widely, making comparisons and analysis difficult.

▸ A stage frame may provide a simplified framework to help you quickly identify one or more general populations of focus for a given funding stream.</td></tr>
<tr><td>Are there other recipient requirements that you will track to narrow the focus of the scan?</td><td>Neighborhood/ Residency status

Income eligibility

Gender focus</td><td>■ The scan may be used to narrow the scope to a certain population or to track additional recipient information useful for later analysis.

▸ While narrowing the scan may bring focus, one caution against this is that narrowing the parameters too finely may result in missing funding streams that could be drawn on, but wouldn’t show up if you use more narrow search terms (this can happen, for example, if you use a scan to search for teen pregnancy prevention funding vs. all funding related to healthy youth development).</td></tr>
</table>

Target Ages (list categories such as “8-12” or “13-15”):

Other Recipient Requirements (define and list categories such as “Annual median income of under $50,000” or “men of color”):

Programmatic Focus

Key Question	Example Parameters	Considerations
What types of programs will the fiscal map identify?	Positive Youth Development Afterschool Treatment/ Intervention & Crisis Services Rehabilitation/ Corrective Services	■ Outlining broad program categories may help you later determine how to shift the mix of funding to better meet your goals. ■ Stakeholders should agree on common language and definitions that can apply across all agency/service contexts in the scan.
What are the developmental areas of focus that the fiscal map will identify?	Employable Healthy Safe Connected Educated	■ Mapping funding streams to developmental goals may help determine critical gaps. In the process, stakeholders should again agree on broad common language and definitions that can apply across all agency/service contexts to be included in the scan. If the community already has an overarching framework of community goals for youth, use that. Otherwise, stakeholders may adopt or adapt from a generic framework.

Program Types (list one of the example parameters mentioned above or a comparable category):

Developmental Areas (list one of the example parameters mentioned above or a comparable area of focus):

Funding Categories

Key Question	Example Parameters	Considerations
What type of expenditures will this fiscal map identify?	**Public** FEDERAL • Mandatory (funds that are prescribed by law) • Discretionary STATE • General Revenue LOCAL • General Revenue **Private** • Local Funders • National Funders	**1.** Determine whether the scan will include public or private funds, or both, as well as the levels of funding for each type. ▶ For discretionary or competitive funding, it is often helpful to also record total value of the relevant funding streams to all communities. This can help stakeholders determine if there are additional resources they can leverage.
What types of flexibility will this fiscal map capture?	**Flexibility** • Administrative Caps • Methods of Evaluation • Performance Measure • Eligibility	**1.** Tracking flexibility provisions can help stakeholders more effectively blend, braid and leverage current and potential funding, allowing for the most flexible funding to be applied to the areas of greatest need that are not adequately covered by other sources of funding. ▶ List and define flexibility provisions that are relevant to the purposes of the scan.
Will this fiscal map capture the flow of funds/fund recipients?	**Fund recipients** • County govt. • City/Municipal govt. • Nonprofit • Schools • Other	**1.** Tracking the flow of funds at each stage of its administration, or identifying fund recipients, may help stakeholders more accurately analyze how funds come into the community and/or identify possible recipients for potential new sources of funding. You can leverage state and local funding data--or for a federal funding stream, explore the Catalog for Federal Domestic Assistance--to obtain this information. **2.** Stakeholders may list the flow of funds in generic categories (from federal to district) and/or specific recipients as the established contact in a given community (which may be particularly helpful for smaller communities with a limited set of partners)

Funding Types (determine types and levels from one of the above options):

Types of Flexibility (list one of the categories from above and define):

Fund Recipients (list one of the categories from above that are most relevant for the purposes of the scan):

Service Descriptions

Key Question	Example Parameters	Considerations
What types of services do identified programs provide?	Academic Support; Basic Needs; College Completion; Counseling; Diversion; Employment/Workforce Training; Financial Literacy; Mentoring; Parent/ Family Engagement Services; Pre-College Preparation; Provider Outreach; Runaway & Homeless Youth Services; Summer; Supportive Services; Training & TA; Truancy; Violence Prevention	■ Communities should pick relevant service categories based on the purposes of the scan.
What service settings are funding streams focused on?	Service Setting • Home • School • Non-profit/Faith-based Organization • Individual Provider/Office • Out of Home/ Residential Placement	■ Service settings are an optional dimension that can be included for purposes of analysis.

Types of Services (list one of the categories from above that apply):

Service Settings (list one of the categories from above that apply):

This list of considerations is not exhaustive but is meant to serve as a starting point for the development of your fiscal map. Your community may decide that other parameters apply—either for the purposes of limiting the scope of the fiscal scan or for identifying dimensions to consider for analysis.

TOOL 5

Example Stakeholder Outreach and Interview Protocols

OVERVIEW

A fiscal mapping project is first and foremost a research and data collection effort. To gather data efficiently, develop a set of research questions, identify the stakeholders who are best able to answer them, and create an interview protocol to guide data collection and analysis.

Hennepin County, Minnesota conducted a fiscal mapping process to identify federal, state, local, and private funding being used to prevent teen pregnancy, support teen parents, and support healthy youth development. This tool includes sample stakeholder outreach and interview protocols used to gather data for this effort.

Sample Outreach Email to County and State Agencies

We are working with Hennepin County's Better Together Hennepin Initiative to identify and confirm funding information on federal, state, local and private funding streams that prevent teen pregnancy, support teen parents and support healthy youth development. Kathy Wick and her team are seeking your help in confirming budget items within your department from state, federal or local governments that relate to the parameters of our fiscal mapping project.

We ask for your department's help in confirming these line items, ensuring we didn't miss any significant sources of funding, highlighting any additional information that your department might have, and providing any basic context useful for understanding the identified line items.

We would appreciate the opportunity to schedule an interview to learn more about these funding streams. Please contact **INSERT STAFF PERSON** at [Insert Email] or [Insert Phone].

Interview Protocol for County and State Agencies

1. As described in our introductory contact with you, we are interested in creating a funding map of the public dollars available to prevent teen pregnancy, support teen parents (Including delay of subsequent pregnancies), and support healthy youth development. We sent a spreadsheet with the relevant line items (Under the purview of your department) ahead of time. At the most basic level, we are hoping to confirm that we have indeed uncovered the appropriate line items—and/or clarify any additions or omissions that need to be made to the budget items themselves.
2. For each line item implicated in this funding stream, we want to confirm and/or fill in gaps on the following (We will address this individually for each department depending on the nature of the gaps within a given department):
   a. What are the intended purposes of those funds? Can we find language stating that intent on your website or receive it through your department?
   b. What is the primary programmatic focus? (Offered as a drop-down list)
   c. What are the target ages for these funds?
   d. Which types of services can be provided through these funds? (Offered as a drop-down list).
   e. Which entities are eligible to receive funds?
   *(If applicable) Are you able to share information on the percentage of governmental vs. non-governmental units that received funds in the most recent fiscal year?
   *(If applicable) What type of flexibility, if any, do you or the recipient have in the use of funds? Please describe allowable flexibilities in use, implementation or reporting.
   f. Do these dollars fund a local or state mandate or are they from a discretionary grant? If mandatory, can you summarize and provide a link to those mandates? If discretionary, what is the likelihood that the program will be continued?

Sample Outreach Email to Private & Community Foundations

We are working with Hennepin County's Better Together Hennepin Initiative to identify and confirm funding information on federal, state, local and private funding streams to prevent teen pregnancy, support teen parents and support healthy youth development. We are seeking your help in confirming budget items within your foundation that relate to the parameters of our fiscal mapping project.

We ask for your organization's help in confirming these line items, ensuring we didn't miss any significant sources of funding, highlighting any additional information that you may have, and providing any basic context useful for understanding the identified line items.

We would appreciate the opportunity to schedule an interview to learn more about these funding streams. Please contact **INSERT STAFF PERSON** at [Insert Email] or [Insert Phone].

Private and Community Foundation Interview Protocol

We have provided a table of funding streams with the most comprehensive information we could find to date on budget lines relevant to your organization. We want to confirm and/or fill in any gaps for each line item included in this scan. (We will address this individually for each department depending on the nature of the gaps within a given department):

- **a.** What are the intended purposes of those funds? Can we find language stating that intent on your website or receive it through your organization?
- **b.** What is the primary programmatic focus? (This will be offered as a drop-down list)
- **c.** What are the target ages for these funds?
- **d.** Which types of services can be provided through these funds? (This will be offered as a drop-down list)
- **e.** Which entities are eligible to receive funds?
  *(If applicable) Are you able to share information on the percentage of governmental vs. non-governmental units that received funds in the most recent fiscal year?
  *(If applicable) What type of flexibility, if any, do you or the recipient have in the use of funds? Please describe.

General Sample Email (for all audiences)

We are working with Hennepin County's Better Together Hennepin Initiative to identify and confirm funding available to prevent teen pregnancy, support teen parents and support healthy youth development. We would like to know if your foundation provides funding for these purposes. If so, is funding available for these services within Hennepin County?

We would appreciate the opportunity to schedule an interview to learn more about these funding streams. Please contact **INSERT STAFF PERSON** at [Insert Email] or [Insert Phone].

General Interview Protocol

1. In reviewing the parameters of this particular fiscal map (See attached parameters), are there any funding streams you support and/or manage that should be included here?
2. For each funding stream, please provide the following information:
   a. What are the intended purposes of those funds? Can we find language stating that intent on your website or receive it through your department/organization?
   b. What is the primary programmatic focus? (This will be offered as a drop-down list)
   c. What are the target ages for these funds?
   d. Which types of services can be provided through these funds? (This will be offered as a drop-down list)
   e. Which entities are eligible to receive funds?
   *(If applicable) Are you able to share information on the percentage of governmental vs. non-governmental units that received funds in the most recent fiscal year?
   *(If applicable) What type of flexibility, if any, do you or the recipient have in the use of funds? Please describe.
   f. What are the total resources available in this particular funding stream?
   g. Are there some that do not fit the age/purpose parameters discussed, and thus, should not show up in this scan?

TOOL 6

Sample Data Collection Tool

OVERVIEW

The data collection tool for a fiscal mapping project should be aligned to the goals of the project. This tool was used to capture federal, state, local, and philanthropic funding supporting specific cradle to career education goals in a single county. The fiscal mapping advisory team collected descriptive data about the funding streams including type, amount, duration, and use of funding to gain an understanding of which available streams were being accessed. This team also captured analytic metrics for each funding stream to gain an understanding of the flexibility and sustainability of each funding stream. Collecting the data in a spreadsheet program allows the maximum flexibility in sorting and presenting data. Consider locking spreadsheets and data collection tools to maintain version control.

Source of Fund	Program Name	Workgroup Goal	Type of Funding (Entitlement, Formula, Discretionary)	Amount of Funding Attributable to Locality	Total Expenditure (where applicable)	Duration	Dates	Eligibility	Additional Information
FEDERAL									
	Community Development Block Grant		Formula	$1,034,638	N/A	1 year	Federal Fiscal Year (7/1)	Income Requirements	Allocated through HUD program for small cities
	Continuum of Care		Project	**	######	Variable (1, 2, 3, 5 or 15 years)	Federal Fiscal Year (7/1)	Homelessness Status, Disadvantaged Populations	Components set forth in the Continuum of Care Program are consistent with the components allowable under the Emergency Solutions Grants program. Recipient eligibility can extend up to six months past status as homeless.
STATE									
	Family and Youth Services Centers		Formula	**	$52,510,700	1 year		Residency within center boundaries	
LOCAL									
PHILANTHROPIC									
	Mary Reynolds Babcock Foundation		Discretionary		$7,200,000	1-3 years	June or October		Supports economic transition projects in KY. Grants may be used for: General operating support; project support; "glue" support for networks and partnerships; organizational development. Grants rarely exceed 30% of overall budget

Source of Fund	Who provides service?	How do funds flow?	Are these funds being maximized?	Are there coordination opportunities?	Are there barriers to use?	Matching Requirements	Sustainability/ Stability of Funds?
FEDERAL							
	Community-Based Organizations	Federal to State to Local	Braiding with HOME funds; local and private funds	No	Minimal; limits on capital improvements	State matches administrative portion; none at local level	Sustainable, contingent on federal budget
	Community-Based Organizations	Federal to State, Local and CBO		Yes	Funds must be used for homeless prevention and homelessness services	Yes	Sustainable, contingent on federal budget
STATE							
	School-based centers	State to local region		Yes			Variable short-term sustainability
LOCAL							
PHILANTHROPIC							
	CBOs; partnership entitites	Direct to organizations	Yes	Yes			

TOOL 7

Planning Tool

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FISCAL MAPPING PROJECT

Completing a Fiscal Map is a complex project that can take several months to complete, and one for which the analogy "take time to make time" rings true. By taking the time up front to establish the scope of your fiscal map, clear, concrete goals, and a methodology, it'll be far easier for you to collect and analyze the right data-- and to solicit buy-in from other stakeholders in the community. This tool is designed to serve as a management and accountability tool that guides your project from planning to communicating results.

Fiscal Mapping **process steps**, and planning considerations are listed in the first column of the tool. Use these process steps to guide the project. In the following column, record **decisions made** during the planning stage. It can be helpful to record the rationale for the decisions as they may shape the final map. Keeping a record of the decisions made, and the conversation that led to them, will be important to note when communicating results.

The **next three columns** provide transparency and accountability for the project. Consider splitting these cells to align to individual process steps. The final column provides space to capture **notes and details** that the project team learns through the process. Careful documentation of the process aids in answering questions about the process and analysis, and in replicating the process later.

Process Steps	Decisions Made	Person Responsible	Target Completion Date	Actual Completion Date	Notes and Learning

A. Determine the Scale and Scope of Your Fiscal Mapping Project

Refer to the Determining Scale and Scope Worksheet

Process Steps	Decisions Made (list responses to one or more of these process step questions.)	Person Responsible	Target Completion Date	Actual Completion Date	Notes and Learning
KEY QUESTIONS TO CONSIDER: **How do you plan to use the results?** **Who are the audiences for the study?** **What will be the scope of your study?** **On what timeline will you focus your data collection?**					

B. Identify Fiscal Mapping Project Team

Refer to the Stakeholder Selection Rubric

Process Steps	Decisions Made (list who fills one or more of the roles here--and how you plan to engage them in the process)	Person Responsible	Target Completion Date	Actual Completion Date	Notes and Learning
IDENTIFY KEY ROLES INCLUDING: ▸ **Project Manager** ▸ **Data Expert** ▸ **Community Liaisons** ▸ **Advisory Group** ▸ **Working Group** **Inform stakeholders and invite them to engage in the process.** **Enlist technical support.**					

C. Determine Fiscal Mapping Goals

Process Steps	Decisions Made (list one or more of the process steps and explain why you selected this option)	Person Responsible	Target Completion Date	Actual Completion Date	Notes and Learning
WHICH OF THE FOLLOWING DO YOU HOPE TO ACHIEVE? ▸ **Advocate for additional funding** ▸ **Align resources** ▸ **Track spending over time** ▸ **Track spending by outcome** ▸ **Start collective impact strategy with knowledge** ▸ **Maximize funding for particular outcomes**					

D. Design the Study Approach

Refer to the Stakeholder Outreach and Interview Protocol Worksheet

Process Steps	Decisions Made (list a response to each of the process step questions here)	Person Responsible	Target Completion Date	Actual Completion Date	Notes and Learning
What datapoints will be included in the fiscal map?					
What timeframe will the project cover (calendar year, school year, federal or state fiscal year)?					
Who will collect the data?					
Who will analyze the data? How will the analysis be vetted?					
What are the key interview questions you need to ask?					
What will your data collection tool look like (i.e. spreadsheet, survey, etc.) and what is the timeline for the process?					

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E. Collect Data

Process Steps	Decisions Made (note which data sources you used)	Person Responsible	Target Completion Date	Actual Completion Date	Notes and Learning
REVIEW KEY DOCUMENTS: ▸ **State A-133 audit** ▸ **State budget** ▸ **Federal Fiscal Mapping Tool** ▸ **Catalog of Federal Domestic Assistance,** ▸ **Youth.gov Map My Community**					
Collect qualitative data.					
Collect quantitative data.					
Keep notes of decisions made during the data collection process.					

F. Communicate Results

Process Steps	Decisions Made (list a response to each of the process steps here)	Person Responsible	Target Completion Date	Actual Completion Date	Notes and Learning
Determine how you will package and format the results.					
Note who "owns" the data and the results.					
Determine who needs to vet or preview the results.					

JOBS FOR THE FUTURE

Jobs for the Future (JFF) is a national nonprofit that builds educational and economic opportunity for underserved populations in the United States. JFF develops innovative programs and public policies that increase college readiness and career success and build a more highly skilled, competitive workforce. With over 30 years of experience, JFF is a recognized national leader in bridging education and work to increase economic mobility and strengthen our economy.

jff.org

COLLABORATIVE

Collaborative Communications is a strategic consulting and communications firm dedicated to collaborative solutions to community, education and related workforce challenges. Collaborative forms and nurtures partnerships with individuals, government, philanthropic, and education organizations at the federal, national, state, district and community levels to develop strategic blueprints to sustainable growth and maximum impact.

collaborativecommunications.com

the forum FOR YOUTH INVESTMENT

Forum for Youth Investment is a nonprofit, nonpartisan "action tank" dedicated to helping communities and the nation make sure all young people are Ready by 21®—ready for college, work, and life. Informed by rigorous research and practical experience, the forum forges innovative ideas, strategies, and partnerships to strengthen solutions for young people and those who care about them.

forumfyi.org