Planning Tool

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?					

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.					