

Notes on the “Budget Education and Outreach” Approach

Taking steps to share information about the agency’s budget decision-making process and the issues decision-makers face in adopting a budget serves a number of important purposes. Such information enables residents to:

- Better understand the budget and the local budgeting process.
- Knowledgeably discuss budget issues among themselves and with decision-makers.
- Understand the constraints affecting the allocation of resources.
- Reach more informed opinions about how limited financial resources should be allocated.

A key message to highlight is that a budget is a series of choices a community makes about how to use available resources.

It’s also important for the community to understand when choices have been made by other decision-makers. For example, state and federal law dictates some local expenditures. Decisions made by state and federal officials also can affect the availability of revenues to meet community priorities, as can economic forces.

Keep in Mind

A public information and outreach strategy is an important first step in involving the public in budget decisions. In fact, it is an essential aspect of the rest of the public engagement strategies described in this guide.

By itself, however, a one-way public information effort results in fairly limited in providing opportunities to meaningfully involve the public in the decision-making process or foster collective ownership of budget-related challenges.

Key Elements

To accomplish the goal of informing the public, materials should be easy to understand and avoid technical jargon. Explain the key decision points an agency faces in adopting a balanced budget in light of the nature, needs and values of the community and larger trends. Present information in an organized and easy-to-read format.

- **Information to Provide.** An overview of the budget sources of revenue, distinctions between restricted and general fund revenue, spending breakdown by service category, current goals and challenges, highlights of new capital projects, economic forecasts and issues that require decisions, and of course, the budget itself. In some communities, including relevant past Council decisions may also be important.
- **Information Outlets.** Options may include the local agency’s website, public access TV, community newsletters, local media (including ethnic media), special mailings, podcasts, public briefings, and more.
- **Inclusiveness.** In diverse communities where a portion of residents have limited English skills, local ethnic media and appropriate translated materials will also increase the likelihood that all elements of the community benefit from the agency’s information efforts.

A good strategy is to identify the key questions decision-makers and the community face as it relates to the budget. For example:

- What are the most important things to do over the next two years?
- What are the trade-offs we are willing to make as a community to accomplish those priorities?

As one city manager has said, these questions communicate the key message that “This is not a government problem, this is a community problem.” He notes that when people understand this is about choices and not just a financial issue, the burden is not solely on the shoulders of local officials.

Finally, it goes without saying that all the information shared about an agency’s budget must be fair and accurate. Withholding important information is a sure way to diminish the community’s trust in the budget process and its leaders. If mistakes have been made in the past that are creating challenges today, admit it. However, do so in a way that acknowledges the good faith and intentions of those who may have made what may appear, with hindsight, to be mistakes.

This note is a service of the Institute for Local Government (ILG) whose mission is to promote good government at the local level with practical, impartial, and easy-to-use resources for California communities. ILG is the nonprofit 501(c)(3) research and education affiliate of the League of California Cities and the California State Association of Counties.

The Institute welcomes feedback on this resource:

- *Email:* tamsler@ca-ilg.org Subject: *Notes on the “Budget Education and Outreach” Approach*
- *Fax:* 916.444.7535
- *Mail:* 1400 K Street, Suite 205 ▪ Sacramento, CA ▪ 95814