Budget Conversation Checklist

Bringing a school improvement request to this semester's budget conversation

Use this before you walk into the room. Check what you can answer, and note what you still need.

1. Describe the school

☐ Name the school and its grade levels.

☐ Say what you are seeing in one or two sentences, and list what the school and district have already tried.

2. Size the request

☐ Count the schools involved and the grade levels they serve, then match what you know to a starting point:

If this is true	Start with
You are not sure why the school is not improving	A standalone Comprehensive Needs Assessment: an outside review with a written report and action plan.
You want sustained, hands-on support	A School Improvement partnership, which begins with the same Needs Assessment and continues with job-embedded coaching.
You already see a specific gap	Added expertise in that area: literacy, mathematics, multilingual learners, special education, leadership, or cultural proficiency and equity.

3. Check funding with your finance team

☐ Ask whether Title I Section 1003 school improvement funds apply.

☐ Ask about comprehensive and targeted support allocations, state turnaround grants, and general school improvement or professional learning budgets.

Funding rules vary by state and district, so confirm what applies with your finance team.

4. Make the timeline clear

☐ Note when the budget decision is made and who approves it. Work for second semester needs approval this semester.

5. Show how you will know it is working

☐ Ask for a personalized action plan with long-term goals and short-term milestones.

☐ Agree on a review after each round of coaching to look at what happened and choose what comes next.

6. Be ready for these questions

If someone says	You can say
"We have done professional development before, and it did not stick."	This work is job-embedded. Coaches work alongside teachers in classrooms, so the learning continues after the workshop.
"Do we have to change our curriculum?"	No. The work builds on the curriculum, assessments, and observation tools the school already uses.
"What happens when the consultants leave?"	Responsibility shifts gradually to your teachers and leaders, so they can sustain the gains.

Want to talk it through? Visit engage2learn.org and we will help you size the request for your school.

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