FISCAL OPERATIONS: Fiscal Data Management

Overview: School action plans, financial analysis, required statistical reports, budget performance forecasts, and public information about student outcomes all require careful manipulation of complex data. Good fiscal data management enables a system to reflect on its performance and predict future needs.

	SCHOOL BOARD	SUPERINTENDENT	PRINCIPAL
GUIDING QUESTIONS	◆ What data does the board need to make financial decisions effectively? ◆ Is there a fiscal data-management system in place? ◆ How can the board promote data-driven fiscal decision making? ◆ In what forms should financial data be available?	◆ What are the operational data-management needs of the district, and how are they being met? What needs are not being met? ◆ What are the educational data management needs of the district, and how are they being met? What needs are not being met? ◆ Is there an individual responsible for data management and analysis? ◆ Does the district have a data warehouse?	◆ What are the data systems are in place within the district/SU and in the school? ◆ What data do you need? ◆ Are data systems compatible across the school and the district? ◆ Who is responsible for data management across the district/ SU? Within the school? ◆ Is the data gathered the data that is needed? How do new data points get added to the system? ◆ What the trends so the data show and how are data systems evaluated for their value? ◆ What are the PD needs of the staff to enable use of the data?

FISCAL OPERATIONS: Fiscal Data Management *(continued)*

TASKS TO CONSIDER	SCHOOL BOARD	SUPERINTENDENT	PRINCIPAL
	◆ Train the board how to interpret financial data. ◆ Receive report from superintendent about data management systems. ◆ Use financial data to drive decisions.	◆ Determine the accounting software employed by the district. ◆ Identify what alternative financial data management applications are supported in the district. ◆ Review how the district coordinates its fiscal data needs.	◆ Review the school and district/SU action plans and annual report to determine financial impacts. ◆ Identify roles, responsibilities, and lines of authority for data gathering, analysis, and management. ◆ Determine timelines and formats for reports and data. ◆ Develop a system to provide feedback about the data and the system for gathering data. ◆ Identify the PD needs of the staff and train staff to use data.