

# Supporting a Comprehensive Approach to a Fiscal Agenda

## Exploring Readiness and Planning for the Work

*This tool is designed to support you in considering the readiness of your community or state to work on prenatal to five fiscal strategies and to plan next steps in response to the current status, and context, of your state or community. The tool includes questions focused on readiness, including previous fiscal planning work, with prompts to explore and reflect on the work in your state or community. It also discusses next steps to align your work with the comprehensive approach to fiscal strategies and reflection on how to advance a system strategies agenda.*

### Initial Interest and Exploration

**I. Consider the work underway in your state/community** (is it included in Race to the Top Early Learning Challenge and/or Preschool Development Grant Birth to Five System plans, system/state plans for prenatal to five sectors, Council/Cabinet strategic plan and goals, other organizing work around prenatal to five needs and programming?)

*Based on what is laid out in these plans (e.g., goals, strategies, questions to be addressed), what needs are pointed to?*

1. *A need for understanding the cost of the plan?*
2. *A need to understand available revenues, the amount of new revenue needed, and ways to generate that revenue?*
3. *Need to analyze current governance structure, fiscal administration and mechanisms, for efficiencies and efficacy?*
4. *Other needs?*

#### Seeking to understand:

- Who else do you need to be discussing and planning with?
- What are ways this broader engagement will occur?
- What supports does your state or community need to pursue these next steps?

**II. Consider the discussions you have had in your state or community, with leaders, coalition members, other bodies engaged in prenatal to five system efforts.**

1. *Who is leading the fiscal work? (their role, vantage point or perspective, area of influence, etc.)*
2. *What is the organization the individual represents (or is linked to) responsible for? What approach does this organization take to their work within the state/community?*

#### Seeking to understand:

- What do you have in place?
- What are your immediate needs?
- Is fiscal work, explicitly, part of the long-term strategy? How is this clear and held by many?
- Where is the motivation or energy for this work?

**III. What fiscal strategies tools have you used in this work?** What activities have sought to address fiscal planning, funding, administration, governance structures? Was their scope sufficient for a comprehensive approach? You may have previously done mapping of available revenue but only for one sector of your full prenatal to five system, which presents a potential gap in information available for a comprehensive system approach.

Completing this table may help you inventory current efforts:

Tool/Activity	Content or sector covered?	When completed? Timeframe?	Results? Analysis or subsequent recommendations?
Mapping (revenue/funding)			
Mapping (funding mechanism/administration)			
Fiscal modeling			
Return on investment analysis			
Economic impact analysis			
Equity impact analysis tool			
Landscape analysis of governance models			

## Strategies to Support State and Community Work

**I. Thinking Systemically** Consider how the work of your state or community is aligned with the core functions of a system, including two of the most critical to driving change on a fiscal agenda:

**1. Shared Leadership (Governance and Administration)** includes leadership, oversight and management of prenatal to five system at both the state and local levels encompassing how the connection between state and local governance and administration occurs.

- Consider the role of shared leadership/governance for the prenatal to five system (leadership, oversight and management), how are these components part of previous or current work on fiscal strategies?
- As you are approaching fiscal strategies work, how are your efforts aligned with the governance of your prenatal to five system?

### 2. Financing Strategies and Funding

**Mechanisms** includes financing strategies and funding mechanisms to support prenatal to five system focused on diverse and stable sources. The financing strategies and funding mechanisms are implemented in an efficient and coordinated manner to best support local implementation and a robust infrastructure of quality, professional and program supports for each area of the system, and the system itself.

- Consider the role of financing strategies and funding mechanisms, is there consensus on a fiscal vision and principles for your state or community that encompasses the concepts of diverse and stable sources; efficient and coordination funding mechanisms; inclusive of services and infrastructure needs?
- In reflecting on previous work on financing strategies and funding mechanisms, have the efforts be focused on one sector, or siloed in their approach? What are the gaps in areas of the prenatal to five system that need explanation to work from a complete picture of financing strategies and funding?

#### Seeking to understand:

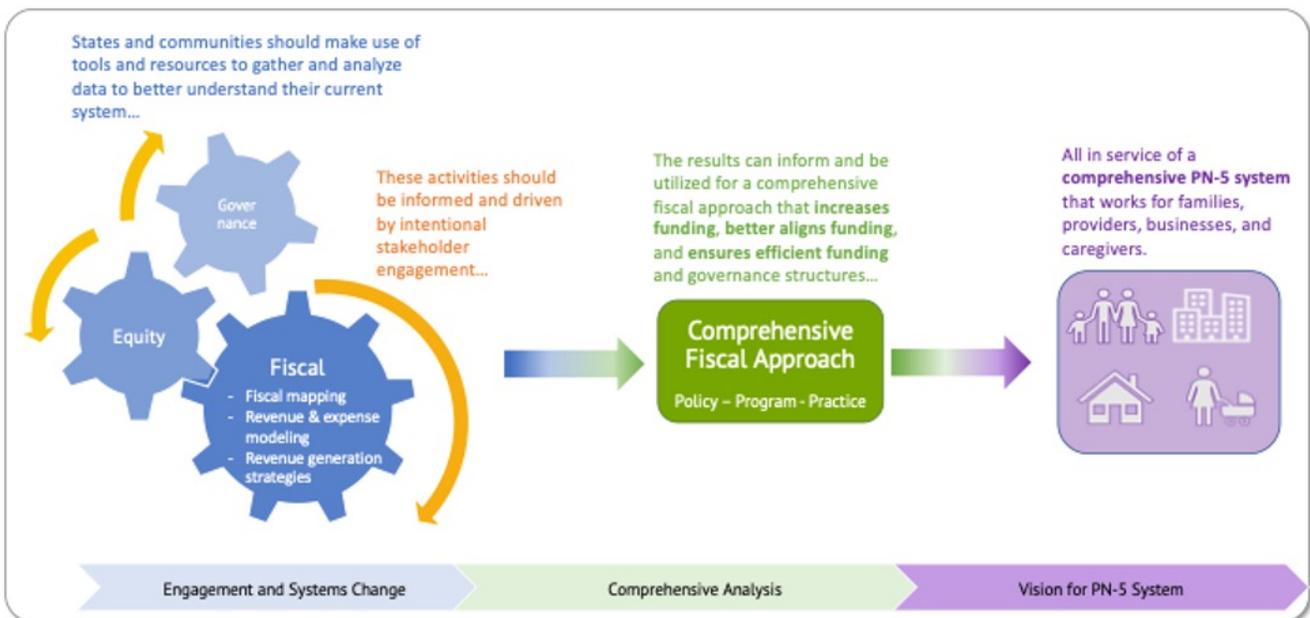
- Where are your efforts in addressing issues from a system level? Is your work organized and thinking in a system function way to support the interrelatedness and need for multi-faceted strategies?
- How could your state or community be supported to see these as fundamental issues (e.g., problem is lack of funds, will new funds be governed under the same siloed funding mechanisms)?
- What is your initial thinking on ways to move your state or community toward comprehensive thinking in work on your solution?

## II. Prenatal to Five Fiscal Strategies Comprehensive Approach

Reflect on ways to align

your state or community's interests, efforts and previous/current work with the comprehensive frame. Consider your state or community against the [P5FS Vision, Principles and Strategic Frame](#):

- Do key stakeholders have a shared vision for your P-5 system? Does this vision include explicit acknowledgment of who pays for the system?
- Is there a set of principles underlying the fiscal, governance, and equity work your state or community is currently engaging in? Which principles are you furthest away from and need more support to achieve? Is there a shared understanding of the interrelated nature of the system components?



## III. Phases of Work

Based on current context in your state or community, consider these phases of fiscal strategies work and the work which frequently accompanies each one. Where would you place your state or community? What resources does your state or community need?

### **Thinking and Planning**

*Vision, Principles, Strategic frame development; Multi-part meeting facilitation content; Landscape analysis of fiscal, governance and equity analysis work*

### **Engagement**

*Developing stakeholder roles, multi-layered; Structure for the work*

### **Support**

*Facilitation; Developing and implementing tailored resources*

### **Action**

*Action plan; Implementation of system change; Comprehensive Fiscal Analysis*

For more information about how P5 Fiscal Strategies may support your state or community work, please contact Jeanna Capito or Simon Workman at [info@prenatal5fiscal.org](mailto:info@prenatal5fiscal.org).