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# Engaging Your Community's Stakeholders in a Fiscal Mapping Process

A Supplementary Resource  
in the Fiscal Mapping Toolkit

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## BACKGROUND

As Promise Zone or place-based initiative leaders embark on a fiscal mapping process, **they must determine the appropriate cross-section of partners that need to participate in a project**—and can serve as champions for implementing key recommendations and findings. Soliciting buy-in at the very start of a project, from local community and political leaders down to individual service providers, is critical to understanding the needs and gaps that a fiscal map should address. A focus on engaging stakeholders also assures that you can collect the data you need for a comprehensive fiscal map.

However, given stakeholders' limited capacity, **lead organizations should be aware of when, and where, to engage particular individuals.** While high-level decision makers across a community should come together at critical junctures in the process (such as affirming the scope and scale of the project; vetting the data categories and affirming understanding of the information you are looking to collect;

or showcasing the findings), promise zone and place-based entities should otherwise be deliberate in how they reach individuals, soliciting and leveraging their input at relevant, strategic intervals.

Before this even begins, lead organizations must effectively define the value proposition of a fiscal map to these stakeholders that may never have heard the term. Otherwise, leads of a fiscal mapping project may struggle to gain the inputs they need from organizations that are wary of sharing information, unaware of the process' impact, and may simply be limited in capacity.

### **This tool addresses several key questions:**

- Who are the key stakeholders that need to participate in a fiscal mapping process?
- When do you reach out to particular stakeholders?
- What are the key messages that you can use to effectively communicate the impact and value of fiscal mapping to community stakeholders?

## Resource Overview

The following tool encompasses several key components; **Part A is a list of key stakeholder groups** that are essential to any fiscal mapping process.

**Part B is a set of decision-making trees** that helps communities determine the most appropriate individuals that should participate at key stages of a fiscal mapping process. We also link here to the Stakeholder Selection Rubric tool where applicable, providing insight into the types of individuals and groups that typically participate in the process (and where their expertise is most relevant).

**Part C includes a set of guiding messages and talking points** that enable communities to frame the value of fiscal mapping, and convey the outcomes it can produce for both service providers and communities more broadly, to a variety of audiences.

# Who Are the Key Stakeholders?

As you are identifying critical individuals and organizations that offer services for children and youth in your community, and/or have an in-depth understanding of the funding streams that support those services, use this checklist to ensure you are including all relevant stakeholders. We have also highlighted the type of group that each stakeholder could participate in, informed by the categories described in the Stakeholder Selection Rubric, which are as follows:

## **Advisory Group**

A high-level group that addresses key questions about research parameters and is most useful at the very beginning and the end of the process

## **Working Group**

Individuals who meet regularly throughout, and guide, the mapping process

## **Consultant/Researcher**

A research center, university, staff, or consultant who conducts the fiscal mapping study, spearheads data collection and analysis, and writes the final report

## **Project Manager**

An individual at the entity leading the fiscal mapping process that devotes a significant amount of capacity to this work and typically is tasked with the following objectives:

- Maintains continual engagement with various stakeholders in advisory and working groups;
- Convenes key meetings at critical junctures of the project among and across these stakeholder groups;
- Develops, and maps progress against, an overarching project plan; and
- Highlights when adjustments or course corrections need to be made

## Part A Who Are the Key Stakeholders?

For each group, indicate if they are relevant to your fiscal mapping process—and if so, list the appropriate individuals in the far right column that you should conduct outreach to:

Advisory Group		
Stakeholder	Should They Be Involved? (Yes/No)	Who Are The Key Individuals?
<b>State or Local Agency Directors</b>		
<b>Community-Based Organizations</b>		
<b>Direct Service Providers</b> Basic needs; education; mental and behavioral health, juvenile justice		
<b>Youth-Serving Non-Profits</b>		

## Part A Who Are the Key Stakeholders?

For each group, indicate if they are relevant to your fiscal mapping process—and if so, list the appropriate individuals in the far right column that you should conduct outreach to:

Working Group		
Stakeholder	Should They Be Involved? (Yes/No)	Who Are The Key Individuals?
<b>Local, state, federal agency staff with program and budget information</b>		
<b>Intermediary Organizations</b>		
<b>K-12 School Districts</b>		
<b>Early Education Centers</b>		
<b>Economic/Workforce Development Organizations</b>		
<b>Courts/Juvenile Justice Centers</b>		

## Part A Who Are the Key Stakeholders?

For each group, indicate if they are relevant to your fiscal mapping process—and if so, list the appropriate individuals in the far right column that you should conduct outreach to:

Consultants/Researchers		
Stakeholder	Should They Be Involved? (Yes/No)	Who Are The Key Individuals?
<b>Intermediary Organizations</b>		
<b>Think Tanks</b>		
<b>Higher Education-Based Institutes</b>		
<b>Independent Subject Matter Experts</b>		



# Which Key Stakeholders Should You Engage at Each Stage?

As you determine how the above key stakeholders factor into certain stages of the fiscal mapping process, follow the decision tree for each critical step of your project and determine the individuals that should be involved based on answers to the below, driving questions that we frequently receive from sites. Map these stakeholders to the corresponding column in Sections A, D, E, and F of the Project Planning Tool found in the Fiscal Mapping Toolkit.

## STEP 1: Defining Your Research Questions

KEY QUESTION	RELEVANT STAKEHOLDER	STAKEHOLDER NAMES
What are you aiming to achieve through your fiscal mapping project? 	<b>Advisory Group Members</b>	
What should the focus area of your project be based on your community's needs? 	<b>Relevant Direct Service Providers, Community-Based Organizations, Policymakers</b>	
Who are the key stakeholders that you need to include in a day-to-day working group? 	<b>Advisory Group Members</b>	

**STEP 2: Establishing Your Parameters**

KEY QUESTION	RELEVANT STAKEHOLDER	STAKEHOLDER NAMES
What type of data do you want to collect? 	<b>Working Group Members</b>	
What data sources are readily available? 	<b>State and Local Agency Staff, Think Tanks, Higher Education Based Institutes, Independent Subject Matter Experts</b>	
What will your data collection framework and interview protocol look like? 	<b>Working Group Members, Independent Subject Matter Experts</b>	
Who should attend a meeting to vet these parameters? 	<b>State and Local Agencies, Direct Service Providers, Community/ Faith-Based Orgs., Schools, Businesses/ Employers</b>	



**STEP 3: Collecting the Data**

KEY QUESTION		STAKEHOLDER NAMES
What are the key documents you need to collect?		<p><b>Working Group Members, State and Local Agency Staff</b></p>
Who is conducting the interviews?		<p><b>Project Manager and Researcher/Consultant</b></p>
Who is collecting and centralizing the data?		<p><b>Consultant/researcher and/or Independent Subject Matter Expert</b></p>
Who is managing outreach to stakeholders?		<p><b>Project Manager</b></p>

**STEP 4: Analyzing the Data**

KEY QUESTION	RELEVANT STAKEHOLDER	STAKEHOLDER NAMES
Who is vetting or "scrubbing" the data? 	<b>Researcher/Consultant</b>	
Who is surfacing the key findings from the data? 	<b>Independent Subject Matter Expert and/or Working Group</b>	
Which stakeholders should join an initial review of those findings? 	<b>Working Group, Relevant Direct Service Providers and Community Based Organizations, Local and State Policy Staff</b>	

**Step 5: Presenting and Disseminating the Data**

KEY QUESTION	RELEVANT STAKEHOLDER	STAKEHOLDER NAMES
<p>How are you visualizing the key findings?</p> 	<p><b>Independent Subject Matter Expert or Local/ State Policy</b></p>	
<p>What type of document are you creating to convey the findings from the report?</p> 	<p><b>Independent Subject Matter Expert and/or Project Manager and Working Group</b></p>	
<p>What forum are you using to present the data?</p> 	<p><b>Advisory Group, Policymakers, Community-Based Orgs</b></p>	
<p>How are you further disseminating the final product?</p> 	<p><b>Community-Based Orgs, Businesses, Direct Service Providers &amp; Nonprofits</b></p>	

Organizations at the helm of fiscal mapping processes often have to elaborate on what such a project can achieve to key stakeholders at the very outset of the effort. Before even beginning to develop the study, they have to solicit the buy-in of these individuals across sectors to ensure they devote the time and inputs needed to achieve the intended outcome: an understanding of existing investments, service gaps in their communities, and the strategies to bridge those gaps.

To ensure you have a compelling, consistent definition of fiscal mapping (and its impact) in hand to present to stakeholders in your community, use the following set of guiding messages to highlight: (1) the need for the process; (2) an overview of the process; and (3) its potential to transform services and supports for youth and families. The below messages not only enable you to solicit buy-in from key organizations around the process—but also build a field-wide understanding of fiscal mapping and its value.

### The Need

- Too often, local leaders address broad goals by designing programs that fit available funding rather than designing comprehensive solutions that actually meet their needs.
- As a result, there are promising programs across our communities but they are narrowly focused and operate in silos, creating a variety of competing, duplicative services for children and youth.
- More significantly, multiple programs draw from the same pots of funding unknowingly, diluting the potential to coordinate resources that can have an even greater impact on our youths and families.
- There is a process that can empower community leaders to address these challenges through: understanding the extent of investments for a particular service or program area; identifying the funding gaps that exist for certain types of services for youth and families; and determining the strategies to coordinate and align resources to amplify impact.

### Describing Fiscal Mapping

- A fiscal map examines where funds originate from, how they are used, as well as the types of programs and outcomes they support.
- A fiscal map can highlight both the available resources in your community that support a particular service area—and the funding gaps that it needs to fill for particular programs or populations.
  - A fiscal map can then help make the case to generate new sources of funding and/or devote existing resources to a particularly under-funded service area.
- Fiscal maps can identify the extent to which investments are supporting an initiative's goals and outcomes—and if these are the right investments that a community should make.
- Fiscal maps can help introduce a more collaborative approach to seeking and using resources, which can lead to an increased likelihood of securing funding for cradle to career programs.

### Highlighting the Impact of Fiscal Mapping

- Fiscal mapping can enable your community to strengthen relationships among disconnected stakeholders, identify new opportunities to bridge service gaps, and better align efforts across a wide variety of entities that are pursuing the same goals.
- A fiscal map enables your community to build a snapshot of how it has allocated its funding streams across outcome areas—and in doing so, illustrate its funding priorities.
  - A fiscal map then reveals if you need to diversify the types of funding streams that support a given area, outlining a path to sustainable success.
- Communities can access critical information from a fiscal map that allows them to strategically align resources, policy, and services to strengthen communities and families.
- Fiscal maps can surface new strategies to flexibly leverage funds that lead to more efficient, innovative delivery of services.