



# BUDGET PLANNING

## Popping the big question to build trust in the process (and a better budget)

Every great school district leader dreams of being able to collectively ask their community big questions like: How are we doing as a district? What do you think about school? What's most important to you? Two things tend to stop them: First, it's what they might hear by asking those open-ended questions. Then, it's what to do with potentially hundreds of pages worth of comments.

Dale Burgos isn't afraid to ask those big questions.

"Some people are afraid to hear what they think people will say," Burgos shares. "But if you really want to effect change, you have to ask those hard-hitting questions. It lets you see where change is needed. It helps us make a difference in people's lives and effectively make change in the district.

"It's also a big part of building trust with the community and a big part of what I do in my profession. I like to be honest. I like to be fair. And I like to share information effectively."

It's the effective sharing of information part that can cause problems for Burgos when he engages the community using traditional methods.

"When we've done surveys in the past, some of the best feedback we got were from the open-ended questions. The problem is, how do we take all those comments and somehow share that with the board or greater community?" he asks. "Reading a 300-page report is not the best way to receive feedback, especially if you're trying to make a big decision and spending millions of dollars."

### Asking the big question

In the lead-up to this year's budget discussions, Burgos saw the perfect opportunity to use Thoughtexchange to ask the community a big, open-ended question. His goals? He wanted to both create a meaningful dialog with stakeholders that would increase trust, and at the same time gather a concise list of action items the board could use in the upcoming budgeting process.



*Thoughtexchange lets us say, 'We heard you and this is what we're doing.' We can't say 'yes' to everything, but we can respond to what's most important.*

**Dale Burgos**



### Thought Leader

Dale Burgos

### Title

Executive Director of Communications, Privacy and Community Engagement



### Industry:

K-12 Public Education

### Location:

British Columbia, Canada

### Size:

14,000 students  
36 schools

### Use Case:

Budget Planning



Burgos used Thoughtexchange to ask the whole community this question: What are your thoughts about what is working well and what can be improved in our schools?

### A new approach to budgeting

After hearing 5,000 thoughts from 3,000 people in just a few weeks, Burgos ended up with a concise report of what was most important to the community, prioritized by the stakeholders themselves.

“What Thoughtexchange was essentially able to do is take all those thoughts and ideas and put that into a report that looked great and boiled everything down into simple language,” Burgos explains. “It gave us top level ideas and effectively changed the way we look at budgeting.

“We’re getting valuable feedback from the community, what they’re passionate about or something they’d like to see change, something we can effectively put our money towards. So, we’re creating a budget to address those concerns or passions people want to see in the district.”

### Beyond the numbers

It’s one thing to budget more effectively and show people the district is acting on what matters most to them. The long game is increasing trust in district leadership by asking people for their thoughts and letting them know they’ve been heard.

“You’ve got people out there who are surveyed to death,” Burgos notes. “And the comments say ‘Why are we being surveyed when you’re not even going to listen to us?’ So Thoughtexchange lets us say, ‘We heard you and this is what we’re doing.’ We can’t say ‘yes’ to everything, but we can respond to what’s most important.

“For parents, you won’t find anything more valuable than their children. They want the best for their child. When they share that information with us and see that changes have been made, that trust is there, and I think it will just keep on building.”

## CHALLENGE

- Collect actionable qualitative data that can be presented in a concise format
- Build community trust by learning what matters

## SOLUTION

- An exchange that let people confidentially share and rate responses to an open-ended question
- Data analysis tools that showed what was most important to everyone and where people agree or disagree

## RESULTS

- A set of key data points to inform a better budgeting process
- Increased community trust and support resulting from a fair, transparent process

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