

10 Steps

TO MODERNIZE AND MORE EFFECTIVELY COMMUNICATE YOUR BUDGET

The traditional approach to communicating the annual budget is to provide an overwhelming amount of information about revenues and expenditures, which are included in many different schedules, highlighting funds, departments, and line items. This approach often leads to a bloated, boring budget book that frustrates the target audience—elected officials and the public. GFOA's new budget award criteria (gfoa.org/budget-award-2026) were designed with these criticisms in mind. The revamped program challenges all governments to adopt a new strategy for budget communication—one that focuses on answering simple questions concisely and in ways that stakeholders outside the finance department will understand. Here we provide practical strategies for improving budget communications and help governments prepare award-winning budget communications.

1 Know your audience. The target audiences for your budget communications are the elected or appointed officials who approve the budget and the members of the public the government serves. Keep this in mind as you determine what information you will include in your budget communications. Technical jargon and lengthy explanations will likely confuse and frustrate these audiences, so don't use them.

2 Answer the questions your audience is asking. Think about what matters most to your audience and focus on answering those questions. GFOA's new award criteria provides sample questions from the perspective of a public stakeholder.

3 Tell your story. Many finance professionals hesitate to use financial information to craft a narrative, preferring to maintain neutrality and let the numbers speak for themselves—but this strategy often leads to information overload or misinterpretation.

4 Get creative. Stop doing things just because you've always done them. Review your budget document and determine what's adding value and what's not. If something doesn't make sense or doesn't enhance your message, leave it out.

5 Be direct. As they say in journalism, "don't bury the lead." Your communications should open, and about the most important message. Some topics are more important than others—if everything is important, then really, nothing is.

6 Avoid redundant or non-relevant information. Don't over-communicate. These days, governments tend to provide every possible piece of financial and non-financial data in their budget communications, all in the name of transparency. But providing too much non-relevant information is often confusing. Your budget document is not the encyclopedia of your organization. It does not need to include details about everything the organization does. For example, organizational charts and other departmental information that is already communicated in the organization's website, strategic plans, or financial policies may not need to be duplicated in the budget document.

7 Be honest. Don't get so carried away with selling the positives of your budget so that the overall

story is no longer true. The ultimate goal of our budget communications should be to build trust with our officials and the public. Embellishing the narrative and over-promising what the organization can hurt trust and credibility. Covering what will be done in the upcoming budget period works against this.

8 Stay focused on the purpose. The budget message should communicate financial and operational plans for the upcoming fiscal year. Don't let information related to your government's history, demographic profile, or past performance dominate the message. Focus on how the budget will support the community's priorities.

9 Enlist the help of non-finance folks in your organization. When crafting a budget message, finance professionals often suffer from the "curse of knowledge." They assume their audience has the same expertise and knowledge they have. They also sometimes get bogged down in the intricate details of the budget and have a hard time crafting a compelling budget narrative. To overcome these challenges, budget and finance professionals should collaborate with the organization's communications team or other leaders to develop budget communications. Use them to draft narratives, tease out major themes, or provide feedback.

10 Go beyond the budget document. Even the best-prepared budget documents are still going to struggle to attract an audience. PDF documents are difficult to view on a smartphone, which is the tool most of your residents use to view online information. Consider other formats like traditional media, social media, website content, videos, or podcasts to communicate key messages. 