

Improvement Opportunity
Goals-driven Budget Development

Outcome: Allocate Resources for Improved Organizational Effectiveness and Efficiency
(10 onsite days w/ available off-site support)

CONTENT

PROCESS

Overview and Pre-planning with Leadership

1 day with the leadership team and budget development leader to outline the budget development focus, structures, and processes; clarify expectations; establish a calendar; determine number of budget teams; identify budget team facilitators; determine budget team members; delineate team data needs, and develop an internal and external communication plan

Budget Development Leader Preparation for Facilitator Training

2 days to identify source documents, develop forms, outline process/key decisions

Internal Leader/Facilitator Training

1 day with budget development leader and budget team facilitators to provide direct training for budget team facilitation and retreat process

Premises (people, systems, goals, planned change, decision-making, and productivity)

Review Structures/Processes (goals, budget process, teams, source documents, forms, calendar, communication plan)

Procedures for Budget Development Retreat (agenda/outcome overview, budget team presentations, decision-making process, group dynamics, facilitation tools)

District Finance Administrator, Budget Development Leader, Team Facilitator Support

3 days to support budget process planners who manage the development process

Budget Development Retreat

2 days to support budget leader in retreat preparation (process presentation, document preparation, retreat logistics, etc.) and during budget development retreat

Goals-driven Budget Development (Evaluation)

1 day to review budget development process, catalog learning, and determine next steps

