Budget Planning Template

Your Financial Leadership Guide

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Your budget decisions will have a lasting impact on your community. This template helps you plan, prioritize, and communicate your financial choices with confidence.

How To Use This Template

Use this resource to guide your financial planning process:

- Current Budget Assessment: Evaluate your current budget landscape
- Resource Allocation Strategy: Identify meaningful adjustment opportunities
- Revenue Enhancement Assessment: Strengthen your revenue sources
- Strategic Budget Priorities: Align resources with community priorities
- Monitoring & Communication Plan: Build support for your financial decisions
- Budget Preparation Timeline: Plan your annual budget cycle

This template is designed to be flexible—focus on the sections most relevant to your needs.

CURRENT BUDGET ASSESSMENT

Examine your financial landscape to identify trends and opportunities.

Department Budget Overview			
Department	Current Budget	% of Total	Trend (↑ / − / ↓)
Planning & Zoning	$	%	
Building Safety	$	%	
Public Works	$	%	
Parks & Recreation	$	%	
Administration	$	%	
Other:	$	%	

Variance Insights

Top departments exceeding budget: _____

Primary reason: _____

Most significant underspending: _____

Primary reason: _____

RESOURCE ALLOCATION STRATEGY

Align spending with priorities and identify efficiency opportunities.

Staffing Assessment

Total personnel costs: $ _____ (_____ % of total budget)

Number of positions currently vacant: _____

Most significant underspending: _____

Staffing adjustment that would improve efficiency: _____

_____

Key Operational Expenses			
Expense Category	Annual Cost	Trend (↑ / − / ↓)	Potential Adjustments
Facilities	$		
Utilities	$		
Fleet	$		
Contracted Services	$		

REVENUE ENHANCEMENT ASSESSMENT

Evaluate and strengthen your community's revenue sources.

Revenue Structure			
Revenue Sources	Current Amount	% of Total	Trend (↑ / − / ↓)
Property Tax	$	%	
Sales Tax	$	%	
Service Fees	$	%	
Permits/Licenses	$	%	
Grants	$	%	
Other:	$	%	

Fee Schedule Review

Last fee schedule update: _____

Services with fees that may need adjustment: _____

_____

Services currently provided without fees: _____

Quick Tip: Compare your fee structure with 3-5 similar communities in your region. This analysis often identifies services that are underpriced relative to your costs.

STRATEGIC BUDGET PRIORITIES

Align resources with community needs and priorities.

Based on resident feedback and council goals:

1. _____

2. _____

Budget adjustments to support these priorities: _____

_____

Priority Investment Project			
For your highest-priority proposed expenditure			
Project Name	Estimated Cost	Timeline	Expected Benefit

How this investment addresses community needs: _____

_____

Partnership Opportunities

Potential shared service or partnership to explore: _____

_____

Expected benefit: _____

MONITORING & COMMUNICATION PLAN

Establish a framework for tracking progress and sharing information.

Key financial metrics to monitor:

1. [   ]

2. [   ]

Review frequency: _____

Stakeholder Communication

Most effective methods to communicate budget information to:

Council/Board: _____

Residents: _____
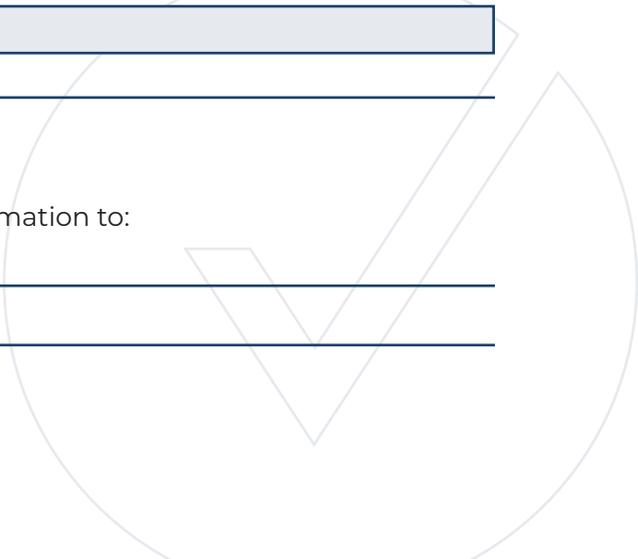
BUDGET PREPARATION TIMELINE

Key milestones for your annual budget cycle:

Timeframe	Key Activities
4-5 Months Before Fiscal Year	Set priorities with council. Gather community input. Issue department guidelines.
3 Months Before	Review department requests. Update revenue projections. Draft initial budget.
2 Months Before	Present draft to council/board. Hold public hearings. Make adjustments.
1 Month Before	Adopt final budget. Communicate to departments. Prepare implementation.

BUDGET REFLECTION

Consider these questions as you finalize your budget approach:

Trade-Off Assessment:

What trade-offs are necessary in this budget cycle? _____

_____

What investments today will benefit the community long-term? _____

_____

Building Consensus:

Which stakeholders will be most affected by budget changes? _____

_____

How will you build support for difficult financial decisions? _____

_____

Quick Tip: Frame budget discussions around outcomes for residents rather than departmental needs. For example, talk about "improving park safety" rather than "increasing the Parks Department budget."

Optimize Your Budget Resources

Effective budget planning is key to your community's success. At SAFEbuilt, we partner with municipal leaders to help optimize resources while maintaining or improving service quality.

Our community development services can help reduce overhead costs and increase efficiency, allowing you to direct more resources toward your priority projects—all while enhancing services for your residents.

We'd be happy to share specific examples of how we've helped communities like yours make the most of their municipal budgets.

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