



## **MANAGEMENT PERSPECTIVE AND THE BUDGET PROCESS**

### **DESCRIPTION:**

This program is designed to improve the participant's ability to produce high-quality budget requests that present decision makers with the information they need to make well-informed resource allocation decisions.

Participants are introduced to the State budgeting processes, key fiscal terms and concepts and many fiscal information resources available to them. Participants are then introduced to a series of concepts and experiences designed to develop the skills needed to produce quality budget concept papers, decision making documents and budget change proposals.

The program assists participants in gaining insight into the perspectives and varied issues executives must address when making decisions. In particular IT professionals learn to remove unnecessary technical jargon and detailed descriptions from documents and presentations that are designed for executive decision makers. Program focuses on finding the right level of information for the intended audience.

Although this is a technical subject, minimal time is spent in a presentation or lecture mode. The learning model includes individual research, small group work, and simulations. In this class participants will complete pre-work related to the budget of their section or unit, critique and revise budget concept papers, participate in a simulated agency level budget meeting, review and critique BCP's.

Participants actively assist in the learning process by completing pre-work and homework in preparation for each day of the workshop. Participants also create a learning plan in which they document their learning for each day and develop a plan to apply what they have learned to their job environment.

### **OBJECTIVES:**

- Successfully describe their role and financial responsibilities as State managers.
- Understand how to analyze the factors that influence decision-makers.
- Analyze issues from the perspective of different decision-makers.
- Familiarization with the California budgeting and financial processes and know where to find budget and financial information
- Write resource proposals that support well-informed budget/resource allocation decisions.
- Develop a plan for the students Department, utilizing tools from the workshop.

### **SUGGESTED AUDIENCE:**

This workshop has been designed for IT supervisors, managers and other IT professionals who prepare or review any type of resource request or decision making document.



**TOPICS COVERED:**

- Executive Decision Making
  - Development of decision documents for management review
  - Identify/understand factors that influence decision making
  - Analyze factors that impact a decision
  
- State Budget Process
  - Budget process overview
  - Identify roles and responsibilities of managers, departments, control agencies and the legislature in the budget process
  - Importance of the manager in the budget process
  - Importance of managing an ongoing budget
  
- Review and Critique Resource Requests
  - Develop criteria for evaluating resource requests
  - Participants critique their resource requests
  - Develop a strategy for improvement of resource requests
  - Develop a final proposal to be presented to a decision making panel
  
- Resource Request Presentation
  - Participants present their resource allocation request to a decision making panel
  - Feedback provided to participants with improvement suggestions from the panel after each presentation

**CUSTOMIZATION (additional fee):**

This workshop is currently designed for a statewide audience, program may be customized to utilize departmental forms and/or coincide with departmental processes.

**DURATION:**

2½ day workshop

**COST:**

\$650.00 per participant

**COURSE SESSIONS:**

October 8, 10 and 11  
February 25, 27 and 28  
March 4, 6 and 7  
June 3, 5 and 6

**TO REGISTER PLEASE CONTACT THE TRAINING AND EDUCATION CENTER AT:**

[training@state.ca.gov](mailto:training@state.ca.gov) or (916) 739-7502