

Outline

Day 1

1. Welcome and Introductions (30-45 minutes)
 - a. Instructors
 - b. Participants
 - i. Introduce themselves
 - ii. Ask a question/ice-breaker about their budget and the challenges of making budget decisions
 1. What are you hoping to learn? What are you hoping to take away from this course?
 2. What is your biggest budget challenge?
2. Budget Manager as Decision Architect (5 hours; objectives 1 and 2)
 - a. What is a decision architect?
 - b. What is behavioral science?
 - c. What are cognitive biases and how do they affect budget decisions?
 - i. Ask for examples of cognitive biases that have impacted their budget decisions
 - ii. Law of triviality
 1. Ask for examples of when they have been impacted by the law of triviality
 2. How to avoid/mitigate the law of triviality
 - d. Four tools of a decision architect
 - i. Widen the option set
 1. Define
 2. Examples
 3. Scenario-based exercise
 - ii. Test assumption and uncertainty
 1. Define
 2. Example
 3. Scenario-based exercise
 - iii. Choose the highest value options
 1. Define
 2. Examples
 3. Scenario-based exercise
 - iv. Trust the process
 1. Define
 2. Examples
 3. Scenario-based exercise
3. Communication, Collaboration, and Trust (30 minutes, objectives 3 and 4)
 - a. Exercise: Explain how clear communication can encourage greater collaboration and build trust within your organization (30 minutes); group discussion and share out

4. Small group discussion (30 minutes): review what you learned today; key take-away; one thing you will do differently based on what you learned today
 - a. Small group discussion and then share out to the larger group (1-2-4-All)
 - b. Homework: read an article on the topic (GFR or white paper)
 - i. Read different budget collaboration articles and report out the next day
 - ii. Assign readings by groups (count people off or group by type of organization) and then have them sit in those groups the next day

Day 2

1. Small group discussion, continued (1 hour)
 - a. Plan remarks/summary (15 minutes)
 - b. Summaries of articles (30 minutes, 5 minutes per group)
 - c. Discussion of common themes (10 minutes)
 - i. Explain how clear communication can encourage greater collaboration and build trust within your organization
2. Financial Foundations for Thriving Communities (1 hour)
 - a. Establish a long-term vision
 - b. Build trust and open communication
 - c. Use collective decision-making
 - d. Create clear rules
 - e. Treat people fairly
 - f. Discuss the pillars
 - i. Which is most important?
 - ii. Which is strongest in your org?
 - iii. Which is weakest?
 - iv. How to strengthen the weakest?
3. Financial Foundations Group Exercise
4. Stakeholder Analysis
 - a. External
 - b. Internal: how to avoid budget games
5. Challenges with Communication and Public Engagement
6. Group Exercise: Review and critique budget communications for a local government and present findings
7. Key take-away: one thing you will do differently based on what you learned today
8. Homework: read an article on the topic (GFR or white paper)
 - a. Read different fiscal fluency article, mental model article, rethinking public engagement, etc.
 - b. Assign readings by groups (count people off or group by type of organization) and then have them sit in those groups the next day

Day 3

1. Small group discussion (1 hour)
 - a. Plan remarks/summary (15 minutes)
 - b. Summaries of articles (30 minutes, 5 minutes per group)
 - c. Discussion of common themes (10 minutes)

2. Simplifying Complexity with Fiscal Fluency and Mental Models
 - a. Understand the limits of rationality (15 minutes)
 - i. Define
 - ii. Show bad examples and why
 - iii. Show good examples and why
 - b. Translate numbers to human scale (15 minutes)
 - i. Define
 - ii. Show bad examples and why
 - iii. Show good examples and why
 - c. Help people grasp the numbers (15 minutes)
 - i. Define
 - ii. Show bad examples and why
 - iii. Show good examples and why
 - d. Catalyze action with emotional numbers (15 minutes)
 - i. Define
 - ii. Show bad examples and why
 - iii. Show good examples and why
 - e. Build a scale model (15 minutes)
 - i. Define
 - ii. Show bad examples and why
 - iii. Show good examples and why
 - f. Develop a communication plan based on a scenario
3. Public engagement
 - a. Recall from yesterday's discussion? (10 minutes discussion)
 - b. Why bother? Why is it important? Is it important? (10 minutes)
 - i. What are the benefits?
 1. Increased trust
 2. Etc.
 - ii. What makes it effective? Achieving the benefits
 - c. Rethinking Public Engagement (45 minutes)
 - i. What are the most important elements from the rethinking public engagement design principles?
 1. Quality over quantity
 2. Etc.
 - d. Exercise: design a public engagement strategy for a particular scenario based on the principles that we talked about (maybe do this in groups based on type of organization); come up with 4-5 different scenarios; present plan to the class for feedback
 - i. 30 minutes to develop plan
 - ii. 5 minutes per group (25 minutes)
4. Key takeaways for Day 3: Ask each person for their favorite takeaway or the one thing they plan to apply/implement when they are back at work

1. Rethinking Budgeting
 - a. Why do we need to rethink budgeting? (20 minutes)
 - b. What does it mean to rethink budgeting? How can we improve on traditional incremental budgeting? (20 minutes)
 - c. What are governments doing to rethink budgeting? (20 minutes)
 - d. How to assess your organization's readiness to rethink budgeting (2.5 hours)
 - i. Describe the tool
 - ii. How to use the tool
 - iii. Each attendee does the assessment
 - iv. Share findings
2. Key Takeaways and Closing (30 minutes)
 - a. Review key concepts from the entire course
 - b. Ask each person for their favorite takeaway or the one thing they plan to apply/implement when they are back at work