

Effective Long Term Financial Planning Process Checklist



Imperatives	Key Characteristics	Implications for My District
<p>Content: Create a burning platform driven both by financial and strategic necessity</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Revenue & expense forecasts frame nature/magnitude of challenges <input type="checkbox"/> Analysis of causes of structural gaps frames reallocation choices stakeholders must make <input type="checkbox"/> Identification of investment imperatives frame strategy-driven need to make reallocations 	
<p>Process: Move key stakeholders through a process that allows them transparency into situation and ownership of choices and their implications</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Analysis of current financial situation creates trust in forecast, key assumptions, etc. <input type="checkbox"/> Stakeholders understand challenges before engaging in solutions 	
<p>Context: Approach design of content and process based on nature and degree of challenge, timing of related processes and understanding of stakeholder influence</p>	<ul style="list-style-type: none"> <input type="checkbox"/> The reason why the platform is burning is based on the true nature of the challenge <input type="checkbox"/> Timing of rollout is integrated with key decision-making cycles (budget development, strategic planning, key elections, etc.) <input type="checkbox"/> Framing of decisions and engagement of stakeholders is deliberate based on understanding of their roles 	