



ABOUT THE TREGOE EDUCATION FORUM

We help K-12 school and district leaders solve complex operational problems using rigorous analysis and effective collaboration. Our approach utilizes strategies from Kepner-Tregoe, an international management consulting firm. These same tools have been used by more than 1,400 of the world's most influential organizations including: Corning, Federal Express, Harley-Davidson, Hewlett-Packard, Honda, Johnson & Johnson, NASA, Lockheed Martin, Eastman Kodak, and SONY. Over 20 million people have been trained in their use.

Since 1993, the Tregoe Education Forum (TEF) has helped educators apply these tools administratively and within the classroom. We have worked with over 8,000 district and school leaders of small, suburban, and urban school districts.

TREGOE EDUCATION FORUM

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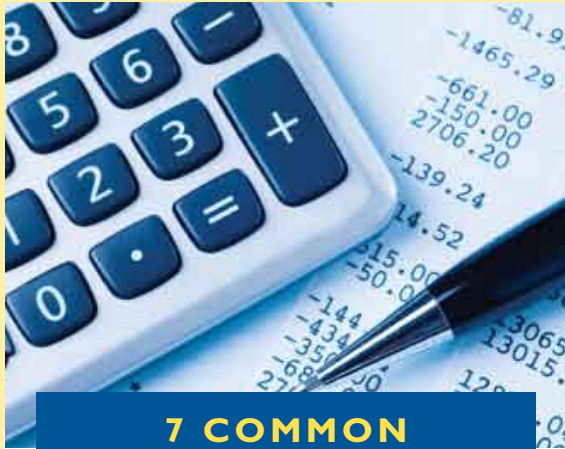
www.tregoe.org
www.yourtake.org



TREGOE EDUCATION FORUM

*Building and
Implementing
Better Budget
Solutions*





7 COMMON BUDGETING TRAPS

Do any of these apply to your district?

1. Focusing too much on the numbers and not enough on the people
2. Opting for fast or decisive action versus right action
3. Setting forth without a plan
4. Overlooking, undervaluing, or not expecting the best thinking from others
5. Ineffectively using data or information
6. Underestimating the need for on-going, two-way communication
7. Treating implementation as an after-thought



KEY ELEMENTS OF TEF BUDGET PROCESS

| | Activities | Deliverables |
|-----------|------------------------------------|--|
| Phase I | Two-day work session | District-specific plan for budget work |
| | Data gathering | Essential budget data and information Endorsed budget objectives |
| Phase II | Two-day work session | Proposed budget actions |
| | | Initial risk analysis Comprehensive communications plan |
| Phase III | Consulting and/or small group work | Budget implementation plan work System for monitoring for results |



BENEFITS OF THE TEF APPROACH

- Provides roadmap for budget work within your district
- Ensures end results that are effective and consistent with district priorities
- Encourages “breakout” thinking to identify budget actions not previously considered
- Provides clear, transparent rationale for budget recommendations
- Secures involvement and support for recommended budget actions
- Builds in-district skills for future budget resolutions
- Provides for smooth implementation and ongoing monitoring of results
- Utilizes TEF staff experienced in district leadership and consulting
- Engenders confidence of school board and others