

How to Win Budget Approvals

HELEN LEI – APOLITICAL, MAY 2026



AGENDA

- 1) About Me
- 2) Budgets Truths
- 3) 3 Strategies To Win Budget Meetings
- 4) Resources



About Me

Budget, Policies, and Performance
Management Analyst

San Mateo County, California

Population = 740,000

County covers 20 cities.

Budget for 2025-26 : 5.5 Billion

Worked with departments to develop
budgets of over \$400M



Budget Truths

In the US, an organization's Budget book provides an overview of the City/County/ Special District. It provides the public with transparency on government matters.

RECOMMENDED BUDGET

Fiscal Years 2025-26 / 2026-27



Board of Supervisors

Jackie Speier, District 1
Noelia Corzo, District 2
Ray Mueller, District 3
Lisa Gauthier, District 4
David Canepa, District 5

Recommended by:

Michael P. Callagy, County Executive Officer

COUNTY OF **SAN MATEO**



Budget Truths

THE COMMUNICATION BETWEEN
FISCAL, POLICY, AND PROGRAM STAFF
ARE ESSENTIAL FOR BUDGET
DEVELOPMENT.



Budget Truths

The budget building process is an art rather than a science.



Budgeting Process



> Budget Oversight

Monitoring financial activities, ensuring compliance with established budgetary guidelines.

> Budget Formulation

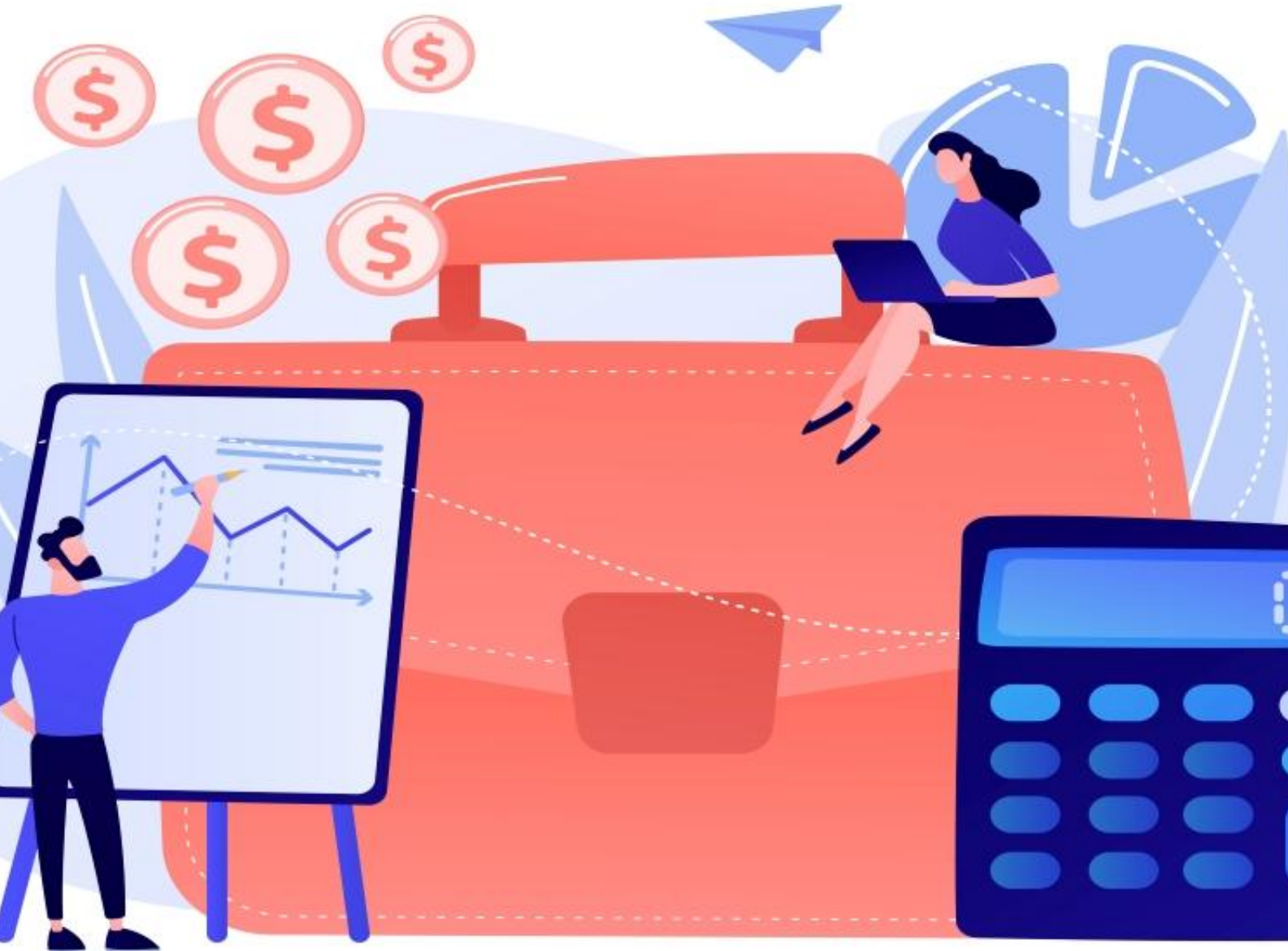
Developing financial plans, allocating resources, and setting spending priorities.

> Budget Approval

Official endorsement of proposed financial plans by relevant authorities.

> Budget Execution

Implementing allocated funds, managing expenditures, and achieving predetermined goals.



3 Strategies to Win Budget Approvals

1. Research and Prepare
2. Frame and Align Goals
3. Communicate Effectively

Research and Prepare

- Research the current environment
- Prepare your proposals
- Create SMART (Specific, Measurable, Achievable, Relevant, Time-bound) performance measures to measure program outcomes



Frame and Align Goals

What are the current goals of your organization?

What are the department's goals?

How does your project/service/program align to these goals?



Communicate Effectively

- Communication throughout the budget process.
- During the budget meetings, craft your budget request in a story narrative.
- Continue to update the public and your sponsors on the budget item (performance measures, updates, etc.)



Additional Resources

GFOA, Government Finance Officer Association, www.gfoa.org

Practical Government Budgeting,
Susan L. Riley, Peter W. Colby

