PLANNING AND OPERATIONS

Budget Review Agenda

[Team or department]: [month or quarter]

MEETING DATE
[Month day, year]

LENGTH
60 minutes

TIME	LOCATION	BUDGET OWNER	FINANCE
[00:00] to [00:00]	[Room or video link]	[Name]	[Name]

ATTENDEES [Names]

OBJECTIVE

Understand why actual spend differs from plan, and approve or reject the changes requested for [next period].

Discuss only the variances above the threshold you agree in advance, for example 10% or [amount]. Everything else is noise.

BEFORE THE MEETING

- Finance: send budget against actuals by [date], with variances over [10%] marked.
- Line owners: write one line explaining each marked variance.
- Submit change requests in writing, with the amount and the reason.

AGENDA (60 MINUTES)

No.	Min	Item	Lead	Purpose
1	**10**	**Budget against actuals** Totals first, then by line.	[Finance]	Inform
2	**20**	**Variances over the threshold** Line owners explain. One-off or ongoing?	[Line owners]	Discuss
3	**15**	**Change requests** Amount, reason, and what happens if we say no.	[Requesters]	Discuss
4	**10**	**Approve adjustments** Approve, reject or defer each request.	[Budget owner]	**Decide**
5	**5**	**Forecast and next review** Updated year-end forecast and the next review date.	[Finance]	Inform

BUDGET AGAINST ACTUALS

Line	Budget	Actual	Variance	%	Reason
[Staff]	[0]	[0]	[0]	[0%]	[One line]
[Software]	[0]	[0]	[0]	[0%]	[One line]
[Marketing]	[0]	[0]	[0]	[0%]	[One line]
[Travel]	[0]	[0]	[0]	[0%]	[One line]
Total	[0]	[0]	[0]	[0%]	

MEETING RECORD

Budget Review Agenda

NOTETAKER
[Name]

YEAR-END FORECAST

	Annual budget	Spent to date	Forecast at year end	Gap
Total	[0]	[0]	[0]	[0]

CHANGE REQUESTS

Decision is one of: Approved, Rejected, Deferred.

Request	Amount	Requested by	Decision
[What and why]	[0]	[Name]	[Approved]
[What and why]	[0]	[Name]	[Approved]
[What and why]	[0]	[Name]	[Approved]

DECISIONS, ACTIONS AND PARKING LOT

Type	What was agreed	Owner	Due
Decision	[What, in one sentence]	[Name]	[Date]
Action	[What, in one sentence]	[Name]	[Date]
Action	[What, in one sentence]	[Name]	[Date]
Action	[What, in one sentence]	[Name]	[Date]
Parked	[Topic, and where it goes next: meeting, email, next agenda]	[Name]	[Date]

NOTES

[Anything else worth keeping: numbers quoted, open questions, who to follow up with]