

STARTER KIT · PIECE 2 OF 3

The Budget Defense One-Pager

Walk into your next budget review with the S.T.A.G.E. framework – and an answer to every question.

Fill this one-pager before your budget review. Each stage answers a question operations leadership will ask.

| PROGRAM / INITIATIVE | BUDGET ASK | FISCAL YEAR |
|----------------------|------------|-------------|
| | \$ | FY |

01

S

Segment
What protected work does this budget enable?

02

T

Target
Which operational KPI will this move?

03

A

Assess
What is the defensible impact score?

04

G

Govern
Who in operations has validated this?

05

E

Execute
How will you prove it landed?

The test: if you cannot fill in a row in fewer than 30 words, you are not ready to defend the line item.

WORKED EXAMPLE

How a Defensible Ask Looks

A real example using the S.T.A.G.E. framework.

| PROGRAM / INITIATIVE | BUDGET ASK | FISCAL YEAR |
|----------------------------------|------------|-------------|
| Operator Capability — South Line | \$340,000 | FY27 |

01

S

Segment

What protected work does this budget enable?

South Line operator certification — 84 operators across 3 shifts. Protected category: regulated competency required by OSHA 1910.119. Separated from discretionary leadership development.

02

T

Target

Which operational KPI will this move?

Process Safety Event rate (PSE Tier 1+2). Current baseline: 0.42/MM hours. Target: ≤ 0.25/MM hours by end of FY27 — aligned with Ops VP commitment.

03

A

Assess

What is the defensible impact score?

Impact: 7/10 (one PSE prevented = ~\$1.8M loss avoided). Confidence: 8/10 (based on Plant 4 pilot, 2024-25, which reduced PSE by 38% in 14 months).

04

G

Govern

Who in operations has validated this?

Endorsed by: Ops VP (R. Martinez, 14 Mar), Plant Mgr South (J. Khan, 18 Mar), HSE Director (A. Pereira, 21 Mar). Sign-off file on shared drive.

05

E

Execute

How will you prove it landed?

Cohort 1 launches July. KPI tracked monthly in HSE dashboard with L&D attribution flag. Quarterly business review owned by HSE+L&D jointly.

Read every cell as if you were the CFO. If the answer is operational, specific, and measured, the line item is safe.