

Leveraging ChatGPT for Local Budget and Finance Director

ChatGPT Enterprise

Introduction

Use ChatGPT Enterprise to turn supplied notes into practical first drafts. These 30 prompts support U.S. local government work. Replace bracketed placeholders and paste the named source excerpts before starting.

For the Local Budget and Finance Director: support municipal or county budget narratives, reporting, and finance coordination. Titles and responsibilities vary. Use your jurisdiction's current assignments and procedures.

Goals

This guide is meant to help:

- Prepare useful drafts for recurring work.
- Make open questions and handoffs visible.
- Keep claims traceable to supplied sources.

Guidelines & guardrails

Use ChatGPT in the ChatGPT Enterprise environment responsibly within your organization's approved guidelines. Before using it for work, keep in mind:

- Use only information permitted in your ChatGPT Enterprise workspace. Remove personal details that are not needed for the task.
- Verify facts, dates, figures, and office procedures. These prompts use pasted context; they do not check live records.
- Staff review every output. Keep official work separate from campaign activity; retain human authority over decisions and public release.

Effective prompting

You can use simple English language instructions (or “prompts” & “queries”) in ChatGPT, and the model responds based on those prompts. Better prompts - that are more thoughtful, clear, and articulate - will yield more useful responses. Keep in mind that every good prompt has:

- **Task** - What are you asking ChatGPT to do?
- **Context** - What additional information or documents should it be aware of?
- **Expectations:** - How do you expect the final output to be formatted?

Before you begin

Name the task and intended audience.

Paste the relevant source material.

Specify the format, length, and deadline.

State what staff must verify before use.

Using this pack

Choose a workflow, replace the brackets, and paste short source excerpts. Name your jurisdiction, audience, and deadline. Review the draft against those sources, then request a focused revision. Follow your organization’s information-handling and records procedures.

Sources and scope

National role context and product guidance. Your current assignments and procedures govern actual work.

BLS — Financial Managers

USAGov — State and local governments

OpenAI — Use ChatGPT

Budget development

Budget call instructions

Best used with: Chat.

Prepare a budget call instructions for the Local Budget and Finance Director in [Jurisdiction], focused on budget development. Use the pasted [Department budget narratives and approved budget calendar] and [Local office instructions]. Return a one-page draft with key points, supporting source references, unresolved questions, and suggested follow-up. Distinguish documented facts from proposals. Use only supplied facts, flag missing information, and list what the responsible staff reviewer must verify before use.

Narrative completeness review

Best used with: Chat.

Prepare a narrative completeness review for the Local Budget and Finance Director in [Jurisdiction], focused on budget development. Use the pasted [Department budget narratives and approved budget calendar] and [Local office instructions]. Return up to eight specific review points, each tied to the supplied text and explaining what staff should confirm. Do not imply that a review point proves an error. Use only supplied facts, flag missing information, and list what the responsible staff reviewer must verify before use.

Budget workshop agenda

Best used with: Chat.

Prepare a budget workshop agenda for the Local Budget and Finance Director in [Jurisdiction], focused on budget development. Use the pasted [Department budget narratives and approved budget calendar] and [Local office instructions]. Return a one-page working outline with purpose, ordered sections, preparation needed, and follow-up. Label suggested timing and assignments as proposals. Use only supplied facts, flag missing information, and list what the responsible staff reviewer must verify before use.

Budget development

Submission status table

Best used with: Chat.

Prepare a submission status table for the Local Budget and Finance Director in [Jurisdiction], focused on budget development. Use the pasted [Department budget narratives and approved budget calendar] and [Local office instructions]. Return a concise table with item, source, documented status, owner if supplied, and next check. Keep proposed assignments separate from confirmed ones. Use only supplied facts, flag missing information, and list what the responsible staff reviewer must verify before use.

Budget book introduction

Best used with: Chat.

Prepare a budget book introduction for the Local Budget and Finance Director in [Jurisdiction], focused on budget development. Use the pasted [Department budget narratives and approved budget calendar] and [Local office instructions]. Return a one-page draft with key points, supporting source references, unresolved questions, and suggested follow-up. Distinguish documented facts from proposals. Use only supplied facts, flag missing information, and list what the responsible staff reviewer must verify before use.

Financial reporting

Monthly finance narrative

Best used with: Chat.

Prepare a monthly finance narrative for the Local Budget and Finance Director in [Jurisdiction], focused on financial reporting. Use the pasted [Verified financial summary tables and finance notes] and [Local office instructions]. Return a one-page draft with key points, supporting source references, unresolved questions, and suggested follow-up. Distinguish documented facts from proposals. Use only supplied facts, flag missing information, and list what the responsible staff reviewer must verify before use.

Variance explanation questions

Best used with: Chat.

Prepare a variance explanation questions for the Local Budget and Finance Director in [Jurisdiction], focused on financial reporting. Use the pasted [Verified financial summary tables and finance notes] and [Local office instructions]. Return up to eight specific review points, each tied to the supplied text and explaining what staff should confirm. Do not imply that a review point proves an error. Use only supplied facts, flag missing information, and list what the responsible staff reviewer must verify before use.

Report terminology glossary

Best used with: Chat.

Prepare a report terminology glossary for the Local Budget and Finance Director in [Jurisdiction], focused on financial reporting. Use the pasted [Verified financial summary tables and finance notes] and [Local office instructions]. Return a concise table with item, source, documented status, owner if supplied, and next check. Keep proposed assignments separate from confirmed ones. Use only supplied facts, flag missing information, and list what the responsible staff reviewer must verify before use.

Financial reporting

Leadership financial brief

Best used with: Chat.

Prepare a leadership financial brief for the Local Budget and Finance Director in [Jurisdiction], focused on financial reporting. Use the pasted [Verified financial summary tables and finance notes] and [Local office instructions]. Return a one-page draft with key points, supporting source references, unresolved questions, and suggested follow-up. Distinguish documented facts from proposals. Use only supplied facts, flag missing information, and list what the responsible staff reviewer must verify before use.

Cross-report consistency review

Best used with: Chat.

Prepare a cross-report consistency review for the Local Budget and Finance Director in [Jurisdiction], focused on financial reporting. Use the pasted [Verified financial summary tables and finance notes] and [Local office instructions]. Return up to eight specific review points, each tied to the supplied text and explaining what staff should confirm. Do not imply that a review point proves an error. Use only supplied facts, flag missing information, and list what the responsible staff reviewer must verify before use.

Capital planning

Capital project summary

Best used with: Chat.

Prepare a capital project summary for the Local Budget and Finance Director in [Jurisdiction], focused on capital planning. Use the pasted [Approved capital plan excerpts and project cost notes] and [Local office instructions]. Return a one-page draft with key points, supporting source references, unresolved questions, and suggested follow-up. Distinguish documented facts from proposals. Use only supplied facts, flag missing information, and list what the responsible staff reviewer must verify before use.

Operating impact questions

Best used with: Chat.

Prepare a operating impact questions for the Local Budget and Finance Director in [Jurisdiction], focused on capital planning. Use the pasted [Approved capital plan excerpts and project cost notes] and [Local office instructions]. Return up to eight specific review points, each tied to the supplied text and explaining what staff should confirm. Do not imply that a review point proves an error. Use only supplied facts, flag missing information, and list what the responsible staff reviewer must verify before use.

Project submission checklist

Best used with: Chat.

Prepare a project submission checklist for the Local Budget and Finance Director in [Jurisdiction], focused on capital planning. Use the pasted [Approved capital plan excerpts and project cost notes] and [Local office instructions]. Return up to eight specific review points, each tied to the supplied text and explaining what staff should confirm. Do not imply that a review point proves an error. Use only supplied facts, flag missing information, and list what the responsible staff reviewer must verify before use.

Capital planning

Capital workshop brief

Best used with: Chat.

Prepare a capital workshop brief for the Local Budget and Finance Director in [Jurisdiction], focused on capital planning. Use the pasted [Approved capital plan excerpts and project cost notes] and [Local office instructions]. Return a one-page draft with key points, supporting source references, unresolved questions, and suggested follow-up. Distinguish documented facts from proposals. Use only supplied facts, flag missing information, and list what the responsible staff reviewer must verify before use.

Capital plan narrative review

Best used with: Chat.

Prepare a capital plan narrative review for the Local Budget and Finance Director in [Jurisdiction], focused on capital planning. Use the pasted [Approved capital plan excerpts and project cost notes] and [Local office instructions]. Return up to eight specific review points, each tied to the supplied text and explaining what staff should confirm. Do not imply that a review point proves an error. Use only supplied facts, flag missing information, and list what the responsible staff reviewer must verify before use.

Department support

Department budget FAQ

Best used with: Chat.

Prepare a department budget faq for the Local Budget and Finance Director in [Jurisdiction], focused on department support. Use the pasted [Budget guidance and department questions] and [Local office instructions]. Write up to six short entries in plain language for [Audience]. Preserve conditions and exceptions in the source; leave unanswered questions visible. Use only supplied facts, flag missing information, and list what the responsible staff reviewer must verify before use.

Budget training outline

Best used with: Chat.

Prepare a budget training outline for the Local Budget and Finance Director in [Jurisdiction], focused on department support. Use the pasted [Budget guidance and department questions] and [Local office instructions]. Return a one-page working outline with purpose, ordered sections, preparation needed, and follow-up. Label suggested timing and assignments as proposals. Use only supplied facts, flag missing information, and list what the responsible staff reviewer must verify before use.

Submission reminder

Best used with: Chat.

Prepare a submission reminder for the Local Budget and Finance Director in [Jurisdiction], focused on department support. Use the pasted [Budget guidance and department questions] and [Local office instructions]. Write a draft of no more than 200 words for [Audience]. Use the supplied tone and approved facts. Leave dates, contacts, and unconfirmed details as placeholders. Use only supplied facts, flag missing information, and list what the responsible staff reviewer must verify before use.

Department support

Department meeting agenda

Best used with: Chat.

Prepare a department meeting agenda for the Local Budget and Finance Director in [Jurisdiction], focused on department support. Use the pasted [Budget guidance and department questions] and [Local office instructions]. Return a one-page working outline with purpose, ordered sections, preparation needed, and follow-up. Label suggested timing and assignments as proposals. Use only supplied facts, flag missing information, and list what the responsible staff reviewer must verify before use.

Budget handoff checklist

Best used with: Chat.

Prepare a budget handoff checklist for the Local Budget and Finance Director in [Jurisdiction], focused on department support. Use the pasted [Budget guidance and department questions] and [Local office instructions]. Return up to eight specific review points, each tied to the supplied text and explaining what staff should confirm. Do not imply that a review point proves an error. Use only supplied facts, flag missing information, and list what the responsible staff reviewer must verify before use.

Resident communication

Budget in brief

Best used with: Chat.

Prepare a budget in brief for the Local Budget and Finance Director in [Jurisdiction], focused on resident communication. Use the pasted [Adopted budget highlights and verified figures] and [Local office instructions]. Return a one-page draft with key points, supporting source references, unresolved questions, and suggested follow-up. Distinguish documented facts from proposals. Use only supplied facts, flag missing information, and list what the responsible staff reviewer must verify before use.

Public hearing explainer

Best used with: Chat.

Prepare a public hearing explainer for the Local Budget and Finance Director in [Jurisdiction], focused on resident communication. Use the pasted [Adopted budget highlights and verified figures] and [Local office instructions]. Write up to six short entries in plain language for [Audience]. Preserve conditions and exceptions in the source; leave unanswered questions visible. Use only supplied facts, flag missing information, and list what the responsible staff reviewer must verify before use.

Capital funding fact sheet

Best used with: Chat.

Prepare a capital funding fact sheet for the Local Budget and Finance Director in [Jurisdiction], focused on resident communication. Use the pasted [Adopted budget highlights and verified figures] and [Local office instructions]. Return a one-page draft with key points, supporting source references, unresolved questions, and suggested follow-up. Distinguish documented facts from proposals. Use only supplied facts, flag missing information, and list what the responsible staff reviewer must verify before use.

Resident communication

Resident budget FAQ

Best used with: Chat.

Prepare a resident budget faq for the Local Budget and Finance Director in [Jurisdiction], focused on resident communication. Use the pasted [Adopted budget highlights and verified figures] and [Local office instructions]. Write up to six short entries in plain language for [Audience]. Preserve conditions and exceptions in the source; leave unanswered questions visible. Use only supplied facts, flag missing information, and list what the responsible staff reviewer must verify before use.

Public narrative accuracy check

Best used with: Chat.

Prepare a public narrative accuracy check for the Local Budget and Finance Director in [Jurisdiction], focused on resident communication. Use the pasted [Adopted budget highlights and verified figures] and [Local office instructions]. Return up to eight specific review points, each tied to the supplied text and explaining what staff should confirm. Do not imply that a review point proves an error. Use only supplied facts, flag missing information, and list what the responsible staff reviewer must verify before use.

Finance workflow

Reporting calendar **Best used with:** Chat.

Prepare a reporting calendar for the Local Budget and Finance Director in [Jurisdiction], focused on finance workflow. Use the pasted [Approved finance procedures and reporting calendar] and [Local office instructions]. Return a concise table with item, source, documented status, owner if supplied, and next check. Keep proposed assignments separate from confirmed ones. Use only supplied facts, flag missing information, and list what the responsible staff reviewer must verify before use.

Closeout preparation checklist

Best used with: Chat.

Prepare a closeout preparation checklist for the Local Budget and Finance Director in [Jurisdiction], focused on finance workflow. Use the pasted [Approved finance procedures and reporting calendar] and [Local office instructions]. Return up to eight specific review points, each tied to the supplied text and explaining what staff should confirm. Do not imply that a review point proves an error. Use only supplied facts, flag missing information, and list what the responsible staff reviewer must verify before use.

Documentation gap log

Best used with: Chat.

Prepare a documentation gap log for the Local Budget and Finance Director in [Jurisdiction], focused on finance workflow. Use the pasted [Approved finance procedures and reporting calendar] and [Local office instructions]. Return a concise table with item, source, documented status, owner if supplied, and next check. Keep proposed assignments separate from confirmed ones. Use only supplied facts, flag missing information, and list what the responsible staff reviewer must verify before use.

Finance workflow

Finance team handoff

Best used with: Chat.

Prepare a finance team handoff for the Local Budget and Finance Director in [Jurisdiction], focused on finance workflow. Use the pasted [Approved finance procedures and reporting calendar] and [Local office instructions]. Return a one-page draft with key points, supporting source references, unresolved questions, and suggested follow-up. Distinguish documented facts from proposals. Use only supplied facts, flag missing information, and list what the responsible staff reviewer must verify before use.

Quarterly process review

Best used with: Chat.

Prepare a quarterly process review for the Local Budget and Finance Director in [Jurisdiction], focused on finance workflow. Use the pasted [Approved finance procedures and reporting calendar] and [Local office instructions]. Return up to eight specific review points, each tied to the supplied text and explaining what staff should confirm. Do not imply that a review point proves an error. Use only supplied facts, flag missing information, and list what the responsible staff reviewer must verify before use.