

Instructions for Using the Budget Data Collection Template

Focus Strategies has developed an Excel workbook to be used to collect and organize project level budget information. For the purpose of this exercise, we use the term “budget” to mean the spending plan for the project for the most recently completed budgeting period, typically the current year in which the project is operating. The budget data needed is at a very high level, and needs only to include the total planned cost of the project (not the individual cost line items) and the expected revenue sources and amounts.

The instructions provided in this document can be used by the Continuum of Care (CoC) lead responsible for gathering budget data. Draft instructions that can be sent to provider organizations from whom data is being requested are provided here <http://focusstrategies.net/swap/budget-collection-tools>. CoCs should feel free to edit these to fit the circumstances of their particular community.

Once populated with the community’s HIC, this Excel template will be a customized, user friendly tool for providers to efficiently provide budget data.

To populate the template:

- 1) Select the tab called “HIC (hidden)”, and review the instructions in red type.
- 2) Paste the HIC data that:
 - a. Corresponds to the column headers in row two; and
 - b. Includes those projects to be analyzed; and
 - c. Is organized in alphabetical order by name of the organization.
- 3) Once the HIC data is entered, cell U3 should turn yellow. Input the HIC year in this cell.
- 4) Select the tab called “Project Information” and toggle through the choices in the (now populated) drop down menu of organizations in cell C1. Ensure that projects are populating appropriately, both in the Project Information and Budget Information tabs.

*** Note that there may be a delay in the population of these tables, especially for organizations with more than one program!*
- 5) Hide the HIC tab.
- 6) Send to providers along with the customized provider instructions and a cover email from the appropriate representative in your community.

If you have any problems populating or using the template please contact Focus Strategies.