

Instruction Form for Filling Out SBA Budget Form

General Instructions:

The form is a fillable PDF, which means that you cannot save the data you have put in the form, but you are able to print out the information once you have input all values. Please keep this in mind when filling out the form. If you are having trouble filling it out electronically, you may **neatly and carefully** handwrite the form.

Once you have completed the form, please print out three (3) copies in **DOUBLE-SIDED** format. Turn one (1) **unstapled, paper-clipped** copy in to the **general** SBA mailbox. Keep one copy for your personal records, AND put (1) **stapled** copy in your organizations binder.

General Information:

1. Put your Organization's Full Name and then the abbreviation
 - a. Example: Native American Law Students Assoc. (NALSA)
2. Briefly describe your organization's purpose.
3. Put your organization's officers' names, titles, and email addresses.
4. Put your faculty advisor's name and email address.
5. Put your estimated membership down for the current academic year.
6. Insert the electronic signature **AFTER** you have completed the form. You are bound by the Honor Code when filling this form.

I. Current Financial Status

1. Indicate whether you have outside bank accounts **other than** a SAFO account by clicking on either YES or NO.
 - a. Include where that account is located and current balance in said account.
2. Include your current SAFO account balance.
 - a. Some organizations may not have a separate SAFO account, if that is the case for your organization, enter 0 here.

3. Add the total value of funds available from outside bank accounts together with those available from SAFO and insert into subsection C.

II. Previous Semester Accomplishments

1. Indicate what the semester prior to this one was.
 - a. Example: If the current semester is Spring of 2008, the “previous semester” was Fall of 2007.
2. Include in subsection A the amount you received from SBA in the previous semester (may be found on SBA website under Budget Information).
3. Include the aggregate amount of funds you received from Other Sources in Previous Semester in subsection B.
4. Include in subsection C an itemized accounting of general expenses you incurred during the previous semester.
5. In subsection D, please insert information corresponding to each event your organization put on during the prior semester that was **NOT** a fundraiser.
 - a. Include a brief explanation and the total cost of the event.
 - b. Complete up to 3 times if necessary.
6. After Event 3, please include a total cost of all NON-fundraising events in the corresponding line.
7. In subsection E, add the totals of subsection C and D together and insert in the corresponding line.
8. In subsection F, please indicate whether your organization undertook any fundraising events.
 - a. Fundraising does NOT include hosting a Bar Review.
 - b. Include a brief description of the event(s), including cost, revenue, and total profit.

III. Request for Current Semester

1. Please indicate what semester this is by checking the appropriate box and include the appropriate year.
 - a. Example, if you are requesting money for the Spring of 2008, please check the box next to Spring and fill in 2008 in the blank space.
2. In subsection A, please include an itemized account of estimated general operating expenses.
3. In subsection B, please include any event(s) you anticipate to put on during the current semester. Include:
 - a. Whether or not it is a fundraising event by checking the appropriate box.
 - b. Description (title, date, location)
 - c. Estimated expenditures with a brief explanation of each expenditure.
 - i. If you run out of room in any space just put the text in the “other” box.
 - d. Add all of the individual estimated costs and put that in the “total anticipated cost of event.”
 - e. If you checked the YES box to fundraising, please include how much you expect to earn in profit from the event as well as a brief explanation.
 - f. Repeat as necessary.
 - g. In the event you expect to have more than 5 events for the current semester, please use an additional event form as a supplement.
4. In subsection C, entitled “Total Anticipated Cost of Events for the Current Semester,” add the total of subsection A to the total cost of NON-fundraising events listed in subsection B of Section III.
5. In subsection D, entitled “Total Anticipated Cost for Fundraising Events,” add the total cost of all events you marked as FUNDRAISING events in subsection B of Section III.
6. In subsection E, please add the values of C & D you listed above in this section.

IV. Anticipated Funding from Other Sources

1. Please indicate what funding you anticipate you will receive from other sources.

2. In the explanation box, briefly describe when you get that money and where it will be used.

V. Total Requested From SBA for Current Semester

1. In subsection A, entitled “Events NOT Deemed Fundraisers,” please use the formula provided.
 - a. First insert the value you put under III.C. in the first blank and then insert any amounts in IV you identified to apply to non-fundraising events. Subtract and put the total amount in the line on the far right.
 - b. If you do not have any outside sources of funding, you may just put in the value entered in subsection C of Section III (entitled “Total Anticipated Cost of Events for the Current Semester”).
2. In subsection B, entitled “Events Deemed Fundraisers,” please use the formula provided. The final answer here is the Seed Money you are requesting from SBA.
 - a. First insert the value you put under III.D. in the first blank and then insert any amounts in IV you identified to apply to fundraising events. Subtract and put the total amount in the line on the far right.
 - b. If you do not have any outside sources of funding, you may just put in the value entered in subsection D of Section III (entitled “Total Anticipated Cost for Fundraising Events”).
3. In subsection C, please add the values of subsections A & B of this section.