Instructions for Using the Budget Data Collection Template

Focus Strategies has developed an Excel spreadsheet 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 below. 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 <u>organization</u>.

    ** Note there may be programs in HMIS that you know will be included in the analysis which are not on the HIC (i.e., Supportive Service Only programs). You should manually add them to the HIC before putting the HIC into the budget workbook. Be sure to enter any programs missing from the HIC in alphabetical order by name of organization.

3) Once the HIC data is entered, cells in column R should turn yellow. Input the CoC Grant Amount (from the most recently completed funding cycle) in these cells for each project that receives CoC funding.
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 attached instructions and a cover email from the appropriate representative in your community.

The Excel template consists of five tabs, only three of which should be visible when sent for data collection to providers. The Drop Downs tab is locked and hidden already, and should not need any adjustments by the user. The HIC tab is labeled "(hidden)", indicating that once the CoC lead has populated it and ensured that the template works correctly, they should hide this tab before sending to the providers.

Compiling Provider Budgets for web BYC upload

Once all provider budgets have been sent back they can be compiled into Budget TEMPLATE for upload. This template can be used to quickly upload all budgets to web BYC.

In order to populate Budget TEMPLATE for upload follow these steps for each provider budget:

1. Copy columns A through I on the green Budget Information tab
2. paste as values columns A through I from each provider's budget into the Budget TEMPLATE
3. follow instructions in BYC user guide for uploading to current BYC