**INSTRUCTIONS FOR FINANCIALS WHEN SEEKING NEW PROJECT SUPPORT**

**Organizational Statement of Revenue and Expenses**

* Insert the name of your organization into the first line of the heading. Insert the name of the project into the third line of the heading.
* Insert the name of the organization, its method of accounting (accrual or cash), and the beginning and end dates of its fiscal year into the footnote at the bottom of the Statement of Revenue and Expenses. Example: “ABC uses accrual basis accounting. FY runs from January 1 to December 31.”
* Please provide organizational budget and actuals figures for the two most recently-completed fiscal years, the current fiscal year, and, if different from the current fiscal year, the fiscal year in which the bulk of the requested project grant will be spent. If possible, please use the income and expenses categories that we have provided. Insubstantial items that clearly do not fit within the provided categories can be listed on the row designated “other.”
* Explain in a footnote any significant surpluses or deficits.

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**PROJECT BUDGET**

* Insert the name of your organization into the first line of the heading. Insert the name of the project into the third line of the heading.
* List the amount of the grant you are requesting in the row titled “Proposed Project Grant.”
* Fill in the appropriate dates for month and year (MM/YY) where requested.
* Project Budget figures should not show a surplus or a deficit. All budget figures should be rounded to the nearest $10.
* No portion of the proposed grant can be earmarked for lobbying. Please use the footnote provided to indicate the maximum amount of the overall proposed project budget that you anticipate will be spent on lobbying. (Example: *“No more than X% of the overall project budget will be spent on lobbying”* or, if applicable, *“None of the overall project budget will be spent on lobbying.”* Please make sure that the lobbying percentage provided in this footnote is credible in light of the planned activities described in the narrative portion of the proposal. If that percentage is not credible, the budget will not be approved.
* The portion of the proposed grant allocated for any particular line item cannot exceed the overall non-lobbying percentage. (i.e., if “*no more than 10% of the Total Project Budget will be spent on lobbying*” then no single line item in the proposed grant budget can be more than 90% of the total amount budgeted for the project for that line item). If 100% of a project’s line item is allocated to the requested grant, then add a footnote stating that no portion of that item will be spent on lobbying.
* Indirect Expenses (overhead)**:** Project budgets may include indirect expenses (overhead) where justified by the scope of the project relative to the overall budget for the organization, and may not, in any case, exceed 15% of the proposed grant. Types of indirect expenses other than those listed in the budget template may not be allocated to this grant without the explicit permission of a program officer.