

2011 Budget Request Instructions

1) Answer the following questions

- a) Is your program in the 2010 budget and is it going to be the same next year as it is today?
- b) If the answer was yes, do you know of any circumstances that will alter the amount of money in your 2011 budget next year?
- c) If the answer was yes, what will change?
- d) Will the change increase or decrease the cost to run the program/mission/ministry?
- e) Are you adding new programs, events or services?
- f) Please identify the different elements of the new programs/events/services that will have a financial cost.

2) Completing the Budget Worksheet:

- a) **Please note all projected expenses must be included on this worksheet for budget consideration. Only the expenses noted on this sheet will be considered in the budget process and, if your budget is approved, only these expenses will be paid.**
 - b) **Approved Format** – all budget submissions **MUST** utilize this approved form. Budget applications utilizing a different form will not be approved. All necessary request forms will be posted on the Diocesan Website and may be filled out directly from these forms and may then be emailed directly to Canon Seville at his email address canonjoe@diocessecpa.org.
 - c) **Purpose for your request** – Use this portion to describe your program(s) for 2011.
 - d) **Projected Revenue and expenditures** – This area allows for a breakdown of your anticipated revenue sources along with expenses.
 1. **Revenue sources** – Use this category to list all monies that you anticipate receiving from other non-Diocesan operating budget sources. The budget should balance where the outcome cash equals income. **IMPORTANT: Please include the amount that you are requesting from the Diocesan Operating Budget.**
 2. **Expenses:** Use this category to broadly list all expenses you plan on having in 2011. Broadly defining your expenses into categories will allow for better tracking of programs, events, and services.
- 3) **Totals**- total the spreadsheet across and down being sure that the final totals agree.
- 4) **Submission of documents:** The completed budget request forms are **due** in the Diocesan Center by **November 30, 2009**. **Important: Only on time budget requests will be considered.**

5) What Happens Next?

1. All requests will be posted on the Diocesan Web site and distributed to Diocesan Council members.
2. In January, Diocesan Council of Trustees will meet for the annual budget hearing. At this hearing there will be a review of each request along with opportunity to answer questions. At the conclusion of the hearing portion of the meeting, Council will use this opportunity to set priorities for the Finance Committee in drawing up a proposed 2011 Diocesan budget.
3. The Budget Subcommittee of the Diocesan Finance Committee will meet in February to prepare a proposed Diocesan operating budget for 2011.
4. At the March Diocesan Finance Committee the proposed budget will be considered and approved for consideration by the full Finance Committee.
5. The approved proposed budget then will go before Diocesan Council for its endorsement to Diocesan Convention.
6. A finalized proposed budget with updated fair share acceptances for the 2010 year will then be posted on the Diocesan webpage for review by all interested parties including delegates to Diocesan Convention and Convocation members.
7. Delegates will meet in convocation to receive not only the proposed budget but all other matters to be considered at Diocesan Convention.
8. If necessary, the Diocesan Finance Committee will meet again in May to revise the proposed budget before it goes before Diocesan Convention for consideration. Any such changes will be posted on the Diocesan webpage for all to review.
9. Diocesan Convention meets in June to approve the proposed budget.

6) Budget Q & A:

Question: What do I do if I have a question or a problem filling out this form?

Answer: Either Canon Seville or Mary Ann Smida, Diocesan Finance Administrator are here to help you through this process. Diocesan number 888-236-5959.

Question: What do I do if I have discovered unexpected and unbudgeted costs in the middle of the year?

Answer: You must petition the Finance Committee for any change in your budget line. You should prepare a presentation detailing the cost incurred, why it wasn't budgeted, what will happen if the adjustment is not approved, and do you have suggestions as to sources of additional funding.