GMF Greater Milwaukee **FOUNDATION** *greater together*
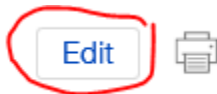
INSTRUCTIONS FOR COMPLETING PROJECT BUDGET IN APPLICATION

Entering Budget Information

1. Within the grant application, select "Edit", if you are not already in edit mode

   [Edit] 🖨

2. Select "Project Budget" from the "Table of Contents"
3. Enter the project budget period in the "Budget Period" field (i.e. 01/01/2020 – 12/31/2020)

   ▼ Project Budget

   Please ENTER project budget PERIOD and SAVE BEFORE adding budget items b
   dates.

   Budget Period   01/01/2020 - 12/31/2020

4. Select "Save" at the bottom of the page before continuing to enter the budget details
5. Click on "Draft Requests" in the left menu, if your application disappears from the screen
6. Select "Edit"
7. Select "Project Budget" from the "Table of Contents"
8. Click on plus sign on the right of the "Earned/Contributed Income" budget item

   Income

   Earned/Contributed Income   ⊕

   No Earned/Contributed Income have been added

   Foundation Grants   ⊕

9. Enter the "Budget Period", if this does not populate (i.e. 01/01/2020 – 12/31/2020)
10. Enter the "Start Date" (i.e. 1/1/2020)
11. Enter the "End date" (i.e. 12/31/2020)

Greater Milwaukee **FOUNDATION** *greater together*

Add Earned/Contributed Income ×

Period
01/01/2020 - 12/31/2020

Start Date
01/01/2020

End Date
12/31/2020

Item	Committed	Pending
Fees/Earned Income		50000
Individual Contributions	12000	
Fundraising Events and Products		
Endowed Income		
Book sales	500 ×	
Optional (click to edit)		
Optional (click to edit)		

Save

12. Enter any extra income items that are related to your project in each of the "Optional (click to edit)" fields (i.e. book sales)
13. Enter all funds that you expect to receive in the "Committed" field
14. Enter all funds that you anticipate receiving but have not been confirmed in the "Pending" field
15. Select "Save"
16. Budget will populate the information you have provided like below:

Income		
Earned/Contributed Income		
Budget Period	Committed	Pending
01/01/2020 - 12/31/2020: 1/1/2020 to 12/31/2020	12,500	50,000
Total	12,500	50,000

Budget Snapshot

	01/01/2020 - 12/31/2020 1/1/2020 to 12/31/2020	
	Committed	Pending
Fees/Earned Income		50,000
Individual Contributions	12,000	
Fundraising Events and Products		
Endowed Income		
Custom: Book sales	500	
Custom: 2		

17. Repeat steps 8 – 18 to enter Foundation Grants (all funds received, or you anticipate receiving from various foundations including the Greater Milwaukee Foundation, and it's supporting organizations [i.e. West Bend Community Foundation, Bucyrus, etc.]) in the "Committed" or "Pending" columns

18. The amount that you are requesting from the Foundation or Supporting Organization should be entered in the "Application Amount Requested" "Pending" field

Item	Committed	Pending
Application Amount Requested		
Unsecured Prospective Funding		
Optional (click to edit)		
Optional (click to edit)		

19. List other foundation amounts in the "Optional (Click to Edit)" line item and enter their amounts in the "Committed" or "Pending" columns (i.e. funds expected to be received from the Knights Foundation should be entered in the "Committed" column if confirmed, or "Pending" if you are seeking but have not received confirmation from them)

20. Click "Save"

21. Repeat steps 8 – 18 to enter Expenses

22. Enter additional expense items in the "Optional (Click to Edit)" line

23. Click "Save"

Editing Budget Information
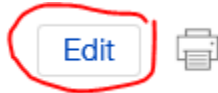
In the case you need to make a change to your budget:

1. Click on the "Edit" icon (pencil and note)

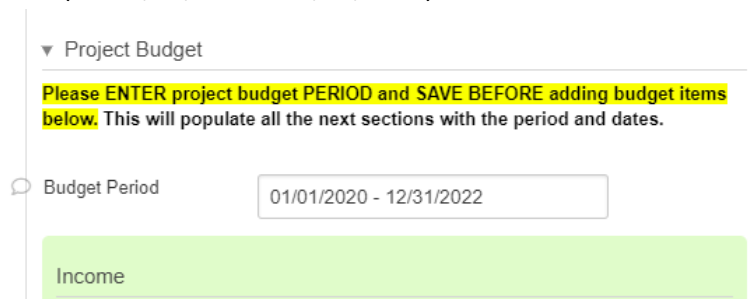| Pending	
50,000	
50,000	

2. Make the appropriate change

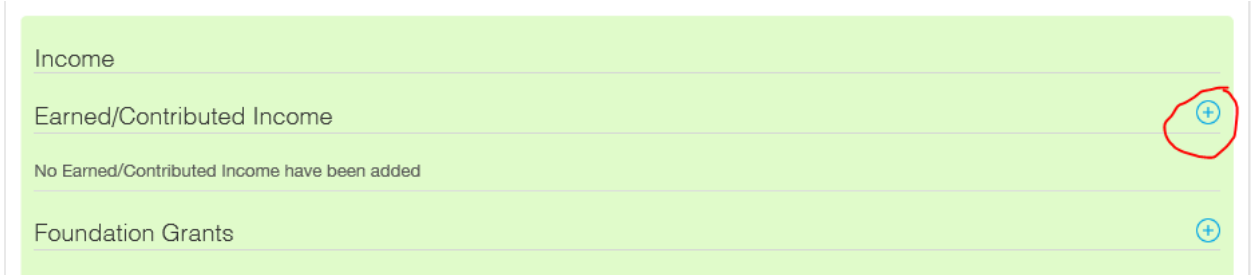3. Click "Save"

Multi-Year Budgets

1. Within the grant application, select "Edit", if you are not already in edit mode

2. Select "Project Budget" from the "Table of Contents"
3. Enter the project budget period for the full time period of the project in the "Budget Period" field (i.e. 01/01/2020 – 12/31/2022)

4. Select "Save" at the bottom of the page before continuing to enter the budget details
5. Click on "Draft Requests" in the left menu, if your application disappears from the screen
6. Select "Edit"
7. Select "Project Budget" from the "Table of Contents"
8. Click on plus sign on the right of the "Earned/Contributed Income" budget item

9. Enter the "Budget Period", if this does not populate (i.e. Year 1)
10. Enter the "Start Date" (i.e. 1/1/2020)
11. Enter the "End date" (i.e. 12/31/2020)

Period

Year 1

Start Date

1/1/2020

End Date

12/31/2020

Item	Committed	Pending
Fees/Earned Income		50,000.00
Individual Contributions	12,000.00	
Fundraising Events and Products		
Endowed Income		
Book sales	500.00	
Optional (click to edit)		
Optional (click to edit)		

12. Enter any extra income items that are related to your project in each of the "Optional (click to edit)" fields (i.e. book sales)
13. Enter all funds that you expect to receive in the "Committed" field
14. Enter all funds that you anticipate receiving but have not been confirmed in the "Pending" field
15. Select "Save"
16. To add the 2nd year of your budget, select the plus (+) symbol in the "Earned/Contributed Income" field

Income

Earned/Contributed Income

Budget Period	Committed	Pending

17. Type in the new budget period (i.e. Year 2)
18. Enter the "Start Date" (i.e. 01/01/2021)
19. Enter the "End date" (i.e. 12/31/2021)

Period

Year 2

Start Date

1/1/2021

End Date

12/31/2021

Item	Committed	Pending
Fees/Earned Income	25,000.00	
Individual Contributions		10,000.00
Fundraising Events and Products		5,000.00
Endowed Income		
Optional (click to edit)		
Optional (click to edit)		
Optional (click to edit)		
Optional (click to edit)		

20. Repeat steps 8 – 19 to enter Foundation Grants (all funds received, or you anticipate receiving from various foundations including the Greater Milwaukee Foundation, and it's supporting organizations [i.e. West Bend Community Foundation, Bucyrus, etc.]) in the "Committed" or "Pending" columns

21. Repeat steps 8 – 20 for the expenses

    Year 1 expenses:

Period

Year 1

Start Date

01/01/2020

End Date

12/31/2020

Item	Expense
Equipment	500.00
Rent/Occupancy	
Office Supplies/Materials	
Marketing	
Depreciation	
Printing	
Utilities	
Postage and Mailing	
Travel	

Year 2 expenses:

24. Click "Save"
25. Budget should look like this when complete (please note that not all 3 years are visible in the Budget Snapshot for the Income section in this image):

Greater Milwaukee FOUNDATION
greater together

Expenses

Non-Personnel Costs

Budget Period	Expense		
Year 1: 1/1/2020 to 12/31/2020	500		
Year 2: 1/1/2021 to 12/31/2021	2,000		
Year 3: 1/1/2022 to 12/31/2022	1,500		
Total	4,000		

Budget Snapshot

	Year 1 1/1/2020 to 12/31/2020	Year 2 1/1/2021 to 12/31/2021	Year 3 1/1/2022 to 12/31/2022
	Expense	Expense	Expense
Equipment	500	1,500	500
Rent/Occupancy		500	250
Office Supplies/Materials			750
Marketing			
Depreciation			
Printing			
Utilities			