

Finance: Budget Summary Template

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About: This template helps organizations create a high-level summary of income and expenses related to Community Clean Energy Resilience Hub (CCRH) operations, proposals, or program budgets. It mirrors the layout used by TRUE Diversity for federal, state, and philanthropic reporting.

Usage Description: This template can be followed to create a Budget Summary to guide the finance stage of a CCRH (Clean Energy Community Resilience Hub) project.



Budget Summary Template

Objective:

This template helps organizations create a high-level summary of income and expenses related to Community Clean Energy Resilience Hub (CCRH) operations, proposals, or program budgets. It mirrors the layout used by TRUE Diversity for federal, state, and philanthropic reporting.

How to Use

1. Fill in the organization name, federal ID, and relevant budget period.
2. Use the income table to list each revenue stream and the % of your overall budget it represents.
3. Use the expense table to outline projected or actual costs across categories like payroll, programming, transportation, etc.
4. Include subtotals and calculate any budget surplus or deficit.
5. Add footnotes and an optional summary of funds already secured.

Organization Information

- Organization Name: _____
- Federal ID #: _____
- Budget Period: _____

Income Sources

Source	Amount (\$)	% of Total Budget
Government Grants		
Corporate Contributions/Grants		
Individual Contributions		
Fundraising Income		
Pro-Rated Tuition Income		

Expenses

Category	Amount (\$)	% of Total Budget
Transportation (Prior Year)		
Transportation (Current Year)		
Payroll – Organization Staff		
Payroll – Program Staff		
Payroll Taxes		
Professional Contractors		
Insurance		
Office Expenses		
Program Expenses		



Budget Summary Template

Office Supplies		
Community Events		

Total Income: _____

Total Expenses: _____

Surplus / Deficit: _____

A. Footnotes

Enter clarifications about calculations, adjustments, or assumptions here.

Example: Expenses are estimated using 5% markup on average contractor bid.

B. Funds Raised to Date

Summarize confirmed grant awards, donations, or pledged funding here.