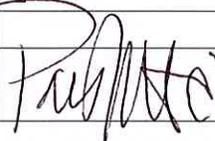


<b>Catholic Charities Disabilities Services</b>	
<b>Agency Standard and Procedure</b>	
<b>Standard Category</b>	Finance
<b>Standard Title</b>	Budgeting
<b>Regulations</b>	
<b>Original Issue Date</b>	6/30/2009
<b>Latest Revision Date</b>	4/4/2016 4/13/2023 6/3/2025
<b>Number of Pages</b>	1
<b>Attachments</b>	
<b>Approved by:</b> Paula Jubic, Executive Director	

**Procedure:**

1. The Director of Finance coordinates in conjunction with the Executive Director with input from other department directors to formulate a financial plan for the applicable fiscal year.
2. The Director of Finance prepares projection for the current fiscal year based on annualized costs adjusted for one-time items and any other known adjustments
3. Each revenue and expense line is reviewed and a projection is made based on prior history and any other items that are known that should be included into the budgeted financial plan.
4. The Executive Director prepares their written plan in conjunction with the fiscal budget plan to be submitted to the Catholic Charities Executive Office.
5. The financial plan is plugged into the budgeting software package and any other required reports by Catholic Charities Executive Office.
6. The completed budget is reviewed and presented to the Agency Finance Committee and a recommendation is made to the Agency Board of Directors.
7. The budget is reviewed and approved by the Catholic Charities Disabilities Agency Board of Directors for submission to Catholic Charities Executive Office.
8. The final written narrative and required financial reports are then forwarded to Catholic Charities Executive Office.
9. Once the budget is approved by the Catholic Charities Board of Trustees, the budget information is uploaded into the Agency's general ledger software package.