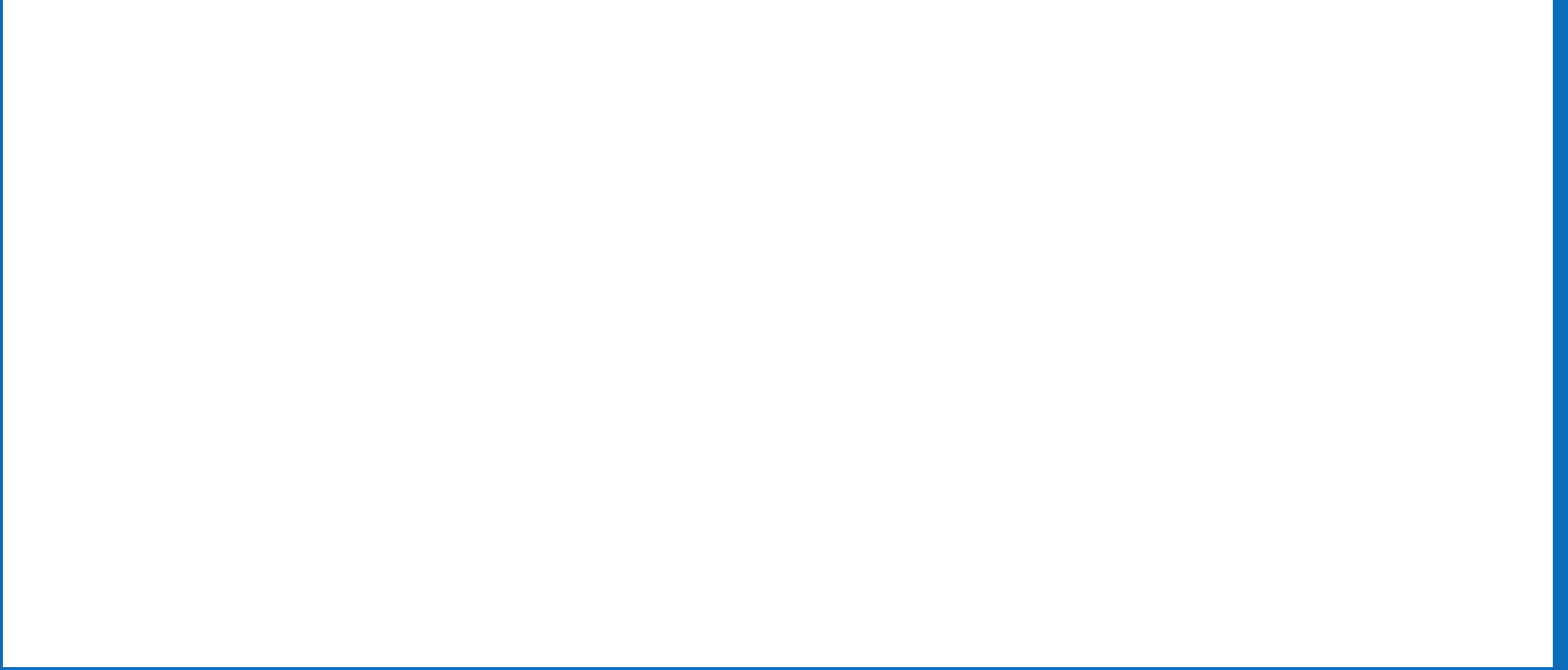


The background of the slide is a photograph of a modern conference room. Several people are seen from behind, looking out of large windows that offer a view of green trees. The room has a clean, professional aesthetic with light-colored walls and large windows. The text is overlaid on a semi-transparent blue rectangular area.

# Financial Workbook Planning and Information Session

Joe Herrera, Financial Compliance

# Helpful Tips to Consider When Creating Your Workbook



# Helpful Tips to Consider When Creating Your Workbook

**Highly recommended:** Familiarize yourself with the workbook and how data from one screen/tab carries over and feeds to others. Before you input your actual numbers, take some time to navigate through the worksheet and get comfortable.

# What Staff Is Looking For

Provide a detailed narrative start-up plan in the application.

Outline costs associated with all start-up activities.

Provide a detailed description of assumptions in the Notes section to assist Reviewer

**Note:** Budget for reserves in case anticipated funding does not come through or falls short.

# What Staff Is Looking For

Letters of commitment from donors and charitable institutions

# Financial Compliance Staff

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