FY2027

First Americans Museum Foundation

BUDGET

HANDBOOK

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Welcome!

*This handbook is your guide to how FAM plans, funds, and measures our impact. It has been carefully crafted to encourage collaborative communication and healing. A good annual budget works as a shared plan to re-commit to one another and to our mission. Every number helps shape how FAM sustains its operations and honors its commitments to the communities to whom we are responsible. When we build together, we practice **data sovereignty**, ensuring that information about us is held and managed **by us, for us**. Accurate budgets give us the power to make informed decisions grounded in the realities of our work -- to listen and react with care.*

Tips to budget like a pro:

***Be collaborative:** Ask for help, ask your teams for input, imagine opportunities together.*

***Be a storyteller**: Justifications are just little stories. What do the numbers have to say?*

***Be timely**: Watch budget deadlines closely and give yourself time to prepare.*

***Be informed:** Check on your spending throughout the year and set aside a time to review.*

***Be proactive:** Change is necessary. Request adjustments as soon as you see the need.*

The Budget Committee thanks you for your continued efforts to make an annual budget cycle a reality. We have tried our best to create a system that works for you, but we acknowledge that this process should continue to change as we do. Please feel welcome to suggest edits or new ideas.

Sincerely,

The Budget Committee
Dr. Kelli Mosteller, Pamela Caro, Kim Leon, Cricket Kaya, Abigail Enos, Tammy Cortez

This handbook explains

- How to navigate the annual budget and project proposal cycle
- How to complete budget and project forms
- How to access files and systems
- How to request adjustments or modifications
- How to manage travel and reporting requirements
- How to access the resources and people who can help you make informed decisions.

Alternative learning resources:

- ✓ Budget Power Hours |Offered by Finance throughout the entire budget process. Drop in to have your questions answered and to troubleshoot in real time.

- ✓ Budget Dashboard | The Budget Dashboard is your go-to for all budget resources, including fillable forms, guides, and video tutorials. You may access this dashboard through the Intranet.

- ✓ Video Tutorials | Finance has filmed video tutorials to help you navigate the budget worksheets. They are a better fit for visual learners.

- ✓ Schedule 1:1 Meetings | You are always welcome to schedule meetings with anybody on the Budget Committee to have your questions answered, build custom reports, or explain a concept.

I | FY27 Budget Committee

Executive Director
Dr. Kelli Mosteller | kellim@famok.org
Provides strategic direction and final approval for all budgets and projects. Reviews major changes and ensures alignment with strategic institutional priorities.

Ask me about…
1. Strategic alignment
2. Project feasibility
3. High-level budget approvals
4. Board and stakeholder communications

Executive Office Manager
Kim Leon | kiml@famok.org
Coordinates committee meetings and schedules; manages document control, deadlines, and communications. Notifies departments of approvals and adjustments.

Ask me about…
1. Strategic Alignment
2. Coordination between departments
3. Submission deadlines
4. File access

Director of Finance
Pamela Caro | pamelac@famok.org
Ensures all departments are represented in the budgeting process and that allocations are balanced and equitable. Oversees overall accuracy and confirms all cost and revenue centers are accounted for. Ensures compliance with internal and external financial standards.

Ask me about…
1. Account coding
2. Prior-year actuals
3. Compliance with City / State regulations
4. Departmental coding
5. Financial Edge (FENXT)

Finance and Development Administrator
Cricket Kaya | cricketk@famok.org
Leads the budget process by managing timelines, distributing forms, collecting submissions, compiling reports, and modeling financial scenarios for planning and forecasting. Serves as the main point of contact for all budget-related communications and adjustments.

Ask me about…
1. Completing forms
2. Timelines and deadlines
3. Budget modeling and projections
4. Budget process, policies, and procedure
5. Reporting and dashboards

Accounting Associates
Abigail Enos and Tammy Cortez
abigaile@famok.org | tammyc@famok.org
Tracks and reconciles revenue and expenses across departments; ensures deposits are accurately reflected in Financial Edge and budget reports. Processes expenses and vendor payments; ensures all disbursements are aligned with approved line items and proper account codes.

Ask me about…
1. Deposits, AR Reporting and Payments
2. Income tracking and reconciliation
3. Payment processing
4. Invoice tracking
5. Expense documentation
6. Dashboard access
7. Financial Edge

II | Key Terms

Division *– The largest organizational structure at FAM. Divisions may oversee multiple departments or act as its own department. Each division is led by a Director who is responsible for managing its budget, staff, and alignment with strategic goals.*

Department *– A specialized area within a division that focuses on a specific function or series of projects. Departments may have dedicated managers or coordinators reporting to a director.*

Project – *Any initiative, program, exhibit, event, or activity that involves staff time from more than one department or requires its own budget. Projects may be one-time, annual, or multi-year and* ***must go through the proposal and approval process before activities may begin.***

Project Lead – *The staff member designated to develop, coordinate, and oversee a specific project. The Project Lead completes the Project Proposal Form (PPF1 & PPF2), manages timelines and deliverables, provides necessary grant reports, and ensures collaboration among all participating departments.*

Core Support *– The set of recurring departmental expenses necessary for day-to-day operations (e.g., office supplies). Core support is distinct from project-based budgets.*

Budget Justification *– A narrative explanation describing the purpose and rationale behind a budget request, new expense, or significant variance.*

Fiscal Year (FY) *- The organization's financial reporting period, which begins on July 1 and ends on June 30th of the following calendar year. The fiscal year is divided into four quarters:*

1. *July, August, September*
2. *October, November, December*
3. *January, February, March*
4. *April, May, June*

Revenue *– Any incoming funds or earned income that support the mission of FAM. Examples include admissions, sponsorships, memberships, grants, donations, and retail sales.*

Expenses *– Any outflow of funds for goods, services, or materials that support FAM operations and projects.*

Restricted Funds *– Revenue that must be used for a specific purpose as defined by a grant, contract, or donor. Spending from restricted funds must comply with the funding terms and audit requirements.*

Unrestricted Funds *– Flexible funding that can be used at the discretion of FAM for general operations or mission-related expenses.*

Data Sovereignty *– A commitment to owning, managing, and interpreting data in ways that reflect Indigenous values. In budgeting, this means maintaining accuracy, transparency, and full control over how financial information used, stored, and shared.*

III | Divisions and Departments and Codes

Institutional Advancement 10	Development 11 Fundraising 12 Communications 15 Marketing 16
Learning and Community Engagement 20	School and Tour Programs 22 Public Programs 24 Family Engagement 26 FAMCamps 28
Operations 99	Custodial 60 Security 61 Maintenance 62 Guest Services 78 FAMStore 80
Curatorial Affairs 30	
Executive 50	
Human Resources 53	
Finance 55	
Building 51	

IV | Budget Cycle Calendar

Deadlines		Activities
11/3/2025	Budget Worksheets Distributed by Finance	Project Leads and/or Directors complete budget worksheets and PPF1. **Directors** must pre-approve all proposals and budgets created by Managers and Project Leads.
12/19/2025	Project Leads submit PPF1 and Budget Estimates to Executive Office Manager	
		Finance prepares preliminary budget reports for executive review.
1/9/2025	Finance delivers preliminary budget to Executive Director	
1/15/2025		Executive approval meetings for PPF1 with Project Leads and Directors.
1/30/2025	Deadline for **Executive** PPF1 Approvals	
		Project Leads making recommended budget adjustments and completing PPF2.
3/2/2025	Deadline for final submission of all forms and PPF2 by Project Leads.	
3/20/2025	Programming Meeting	Finance and Budget Committee preparing budget scenarios.
3/20/2025	Facilities/Building Meeting	
3/25/2025	Human Resources Meeting	
3/30/2025	Fundraising Meeting	
4/30/2025	Budget committee concludes approvals.	
		Finance finalizes adjustments and prepares final reports.
6/1/2025	Final Reports delivered by Finance	Budget approved at EOY Board Meeting.
7/1/2025	Budget activated in Financial Edge.	Budget is Active. New FY Begins

Other Meetings and Deadlines

Budget Adjustments	Weekly on Tuesday at 1:00pm
Contracts Committee Meetings	Monthly during the first week of the month.
Director Budget Meetings	Monthly

V | Annual Budget Forms and Templates

File Access

All forms are located centrally in the ***Executive SharePoint > Budget***. Forms are separated by Fiscal Year, Division, then Department. This link will not be shared within the Intranet – please favorite this tab in your browser.

Permissions

Directors: Restricted editing access to their respective Division files.
Managers: Restricted editing access to their respective Departments.
Staff and Project Leads: Read-only access at the discretion of their Director.
Finance Staff: Editing access to all non-payroll related files.

Form Overview

Budget Worksheet (Excel)	Collects department, division, and project-specific expenses and revenues. Forecasts anticipated expenses and revenues for three years beyond the current budget cycle. Provides narrative explanations for new or adjusted line items.
Project Proposal Forms PPF1 (PDF)	Used to introduce and justify new projects to the Executive Director. Part 1 (PPF1) establishes a concept and strategic alignment and is designed as a starting point for coordination between Project Leads and their Director. Following approval from the Executive Director, the form enables the Project Lead to proceed with further planning into PPF2.
PPF1 Approval Rubric (PDF)	Completed by the Executive Director following a presentation of PPF1 by the Project Leads and/or Director. Approval moves the project to PPF2.
Project Proposal Form PPF2 (PDF)	Part 2 (PPF2) tracks logistical planning and capacity across departments. PPF2 is designed to assess the interdepartmental capacity of a project and all other logistical requirements including a detailed project budget.
PPF2 Approval Rubric (PDF)	Completed by the Executive Director following a presentation of PPF2 by the Project Leads and/or Director. Approval integrates the project into the next fiscal budget.
Personnel Worksheet (Excel)	Tracks anticipated staffing costs by division. Maintained exclusively by directors, Finance, and HR. Can be used to budget for additional staff members.
Travel Authorization Form (PDF)	Documents pre-approval for travel expenses, ensuring alignment with budgeted line items and reimbursement policies. Provides insight for strategic, inter-departmental conference attendance.

Form Submission

Forms must be completed electronically and uploaded to the assigned SharePoint folder, **not sent over email.**

VI | Completing the Budget Excel Worksheets

Navigating the Excel Worksheets

Each tab in the workbook serves a specific function. Tabs are color-coded to help you quickly identify where to enter data and where to reference information.

[Start Here] – Select your Division and Department, and list project names by Fiscal Year (FY27-FY30). **This sheet must be completed first,** as this data filters to all the other spreadsheets.

[Budget Calendar, Account Codes, FY25] – Reference sheets only. They contain budget timelines, approved account codes, and definitions.

[FY27-30] – Enter budget data for each fiscal year (Revenue, Core Support, Projects, Travel) Only enter data in the cells highlighted with the color matching their category.

[Discounts and Perks] – Enter any known discounts and perks your department is offering to a constituent. This could be a school district, a donor, a partner, or any other stakeholder who receives special benefits. This amount must be subtracted from our revenue.

Completing the Worksheet

1. Ensure that all information has populated from your Start Here sheet. The Division and department (if applicable) should appear on the left side of each budget.
2. Refer to the codes provided and estimate revenue and expenses for each fiscal year. You may refer to the FY25 Actuals to make an informed estimate. **Only enter data in the highlighted cells.**
3. The expense code Description is a validated drop-down, which means it is only pulling a list of options from the Account Codes sheet. Once selected, the Expense Code number will auto-populate to the left of the cell.
4. A few cells will already have account codes listed. These are required.
5. If a line item has been budgeted before, please complete the amount spent in FY25. The variance will then calculate.
6. If applicable, write a brief justification of the change or new line item. A longer narrative justification can be written in the highlighted box just below each budget.
7. **You are not expected to complete every line of each budget template provided.** It is acceptable to have blank lines in your completed form. However, if you run into an issue where there is not enough space to budget for your project, contact the Budget Committee to add more lines.

Budget Checklist

- ✓ **I have budgeted recurring projects, or projects carried over from the prior year.**
  Examples include FAMCamps; Exhibits that opened this year but stay open next year, and conferences where you pay the fees in this FY but go to next FY. See page 20 for a list of recurring projects from the prior year.
  Ask yourself: *Will this program or project still have costs or income after June 30?*

- ✓ **I have included a contingency line for relevant projects.**
  A contingency expense code (8009) can be used as a safety net for unexpected expenses. However, the amount **must not exceed 10%** of the project budget, or **10% of your total Core Support** budget. 8009 is not a spending code. When the time comes to spend this amount, you must make a budget adjustment.

- ✓ **I have estimated the date of each expense.**
  Reminder that FAM no longer receives large, lump sum payments at the beginning of the FY. **Please limit spending in July.**
  - ✓ Enter at least the month that each expense or revenue is expected
  - ✓ Adjust any subscriptions or renewals that normally fall in June/July
  - ✓ Avoid loading too many expenses into one month – spread spending throughout the year.
  - ✓ For programs that require significant spending, spread expenses across multiple months gradually leading up to the event
  - ✓ Correlate grant-related expenses with receipt or revenue.

- ✓ **I have included any new or replacement hires.**
  In the personnel sheet, note the month you plan to start each position. Only budgeted positions will be approved for hiring next year, and are not guaranteed. Prepare to discuss and make the case for new hires in your meetings with the Executive Director.

- ✓ **I have estimated all discounts or perks.**
  Discounts or free perks to donors, sponsors, partners, etc. must be subtracted from gross revenue. This includes free room rentals, complimentary meals, merchandise for sponsors, or free memberships. This keeps reported revenue realistic and transparent for the audit.

- ✓ **Other commonly missed items**
  - ✓ Annual software renewals (Blackbaud, zoom, adobe, etc)
  - ✓ Mark whether an item is contingent on something (new hires, fundraising, or a contract)
  - ✓ Staff development or training costs
  - ✓ Staff hospitality (birthdays, celebration lunches, etc)
  - ✓ Marketing budgets for projects
  - ✓ Programming budgets for projects
  - ✓ Equipment and maintenance or replacements (computers)
  - ✓ Office supplies, paper, ink, etc for your entire department.
  - ✓ Supplies for ongoing programs that run year-round. Budget for every month.
  - ✓ Insurance or permit renewals
  - ✓ Contract renewals for recurring vendors (cleaning, security, valet, etc)

- ✓ **Final Tip**
  Double check all dates, totals, and account coding before submitting. A little extra review now saves major adjustments later!

Account Coding Overview

Account codes categorize all budgeted revenues and expenses so Finance can produce accurate reports for the Board and annual audit. The codes follow a standardized structure, and naming conventions apply across multiple departments. This is important, because it allows us to see spending for a particular category between and across all departments.

The codes are formatted as **RR-CCCC-DD PPPP GTXXX**

RR	Two-digit restriction code. 01 – Unrestricted 02 - Restricted
CCCC	4-digit account code. May be for an expense or revenue.
DD	2-digit department code. Divisions also have a department code.
PPPP*	4-digit project code.
GTXXX*	5-digit grant code. Used for tracking grant expenditures across projects and other codes.

Unrestricted Coding Example:

01-6021-28 1332

01	Unrestricted
6021	Food and Beverage
28	Public Programs
1332	Teen Guide Programs

This is the coding for an unrestricted food and beverage cost in the Public Programs department for the project Teen Guide Programs.

Restricted Coding Example:

02-6027-30 1045 GTTER01

02	Restricted
7075	Research Supplies
30	Curatorial Affairs
1045	WINIKO: Reunions
GTTER01	Terra Foundation Grant

This is the coding for a restricted expense to purchase Research Supplies in the Curatorial Affairs department for the project WINIKO: Reunions. It is restricted because it is paid for by a grant, which the code specifies as the Terra Foundation.

*****Not all expenses will require a grant code and project code.***

Expense Code Best Use Cases

Below is a series of expense codes categorized by best use case. Codes highlighted in blue indicate that their use is restricted by department.

Core Support

Expense Codes

6020	Staff Training and Development
6045	Printing/ Publications
6046	Postage/Freight
6048	Dues, Licenses & Subscriptions
6050	Office Supplies*
6053	Office Furniture
6055	Office Equipment
6058	Office Equipment Maintenance
8099	Contingency**
8135	Supplies – Uniform
TBD	Supplies – Badge
TBD	Supplies – Business Cards
TBD	Supplies – Name Tag
7060	Contract Services
7006	Software Expense

*A contingency expense code (8009) can be used as a safety net for unexpected expenses. However, the amount **must not exceed 10%** of the project budget, or **10% of your total Core Support** budget. 8009 is not a spending code. When the time comes to spend this amount, you must make a budget adjustment.

Programs and Activations

Expense Codes

6034	Program Supplies
7065	Honorarium
6047	Asset Development Contracts
7070	Reciprocity Supplies
6024	Instructor/Presenter Professional Services
6022	Talent Expense
6089	Signage & Facility Equipment
6042	Advertising & Marketing
6021	Food & Beverage
7015	Professional Services-Security
6044	Photography
8099	Contingency

*Foundation Events and Gala***

Expense Codes

6026	Event Professional Services
6071	Floral
6089	Signage & Facility Equipment
6042	Advertising & Marketing
7015	Professional Services - Security
6022	Talent Expense
6044	Photography
6024	Travel FAM Guest Instructor Presenter

** Event codes are not for use to track activities from 39 Enterprises. They are intended for ***Foundation use only***. For coordinated events between the two entities, the Foundation hires 39 Enterprises through a contract. Most event expenses for the Foundation will be coded as Professional Services.

Marketing and Communications

Expense Codes

6042	Advertising & Marketing
6043	Media Buys*
7210	Meta Ads*
7215	Google Ads*
7220	Media Buy – TV*
7225	Media Buy - Bill Boards*
7230	Media Buy - Print Media*
7235	Media Buy – Radio*
7240	Media Buy – Streaming*
7250	Event Signage
7260	Promotional Merchandise*
7265	Distribution Lists*
7270	Direct Mail*
6044	Photography
8099	Contingency

*Due to the way that many of these purchases are bought in bulk deals at the beginning of the year, many of these expenses are restricted to department 16. ***Other departments should use code 6042.***

Development and Fundraising

Expense Codes

6036	Member Services & Events
7080	Professional Memberships
7095	FAM Outside Sponsorships
7065	Honorarium
6042	Advertising & Marketing
7070	Reciprocity Supplies

Executive / Administrative

7063	Contract Services/ PTEs
7062	Capital - Contract Services
6057	Office Equipment Lease Expense
6060	Office Lease Expense
6062	Copier Overage Expense
7085	Miscellaneous Other Admin Expense
7003	Miscellaneous Other Operating Expense
7045	Professional Services-Legal
7050	Exec Services Contracts

Facilities

6083	Janitorial Supplies and Materials	**8170**	Subcon - Elevators
6085	Building Maintenance Supplies & Materials	**8172**	Subcon - Overhead Door
6087	Equipment Rental	**8173**	Subcontractor Fees
6088	Equipment Repair	**8174**	Supplies - Safety
6089	Signage & Facility Equipment	**8176**	Rent Equipment
7008	Utilities Expense	**8180**	R & M - Furniture & Equipment
8135	Supplies - Uniform	**8182**	R & M - HVAC
8136	Supplies - Reimbursable Expense	**8184**	R & M - Painting & Decor
6050	Office Supplies	**8186**	R & M - Auto, Fuel & Oil
8138	Telephone - Cell Phone	**7010**	Professional Services-Facilities
8143	Permits & Licenses	**7020**	Professional Services-Maintenance
8158	R & M - Janitorial	**7030**	Professional Services-Architectural & Engineering
8160	R & M - Building	**8166**	Subcon - Fire Protection
8164	Sub HVAC		

Exhibit Development

6038	Exhibit Development, Production and Collection
6047	Asset Development Contracts
6052	Exhibition Supplies
6054	Exhibition Furniture
7065	Honorarium
7070	Reciprocity Supplies
7075	Research Supplies
6087	Equipment Rental
6088	Equipment Repair
6042	Advertising & Marketing
7035	Professional Services-Exhibit Design
6022	Talent Expense
6024	Instructor/Presenter Professional Services
7015	Professional Services-Security
6044	Photography
8099	Contingency

Travel and Conferences

Expense Codes

6023	Travel - Rental Car Expense
6029	Travel – Parking Fees
6030	Travel – Meals – Reimbursed
6031	Travel – Meals – Direct
6032	Travel – Mileage
6033	Travel – Hotel/Lodging
6105	Travel – Checked Baggage Fees
6107	Travel – Air Fare
6108	Travel – Ground Transportation
6109	Travel – Conference Registration Fees
6110	Travel – Tolls
7080	Professional Memberships
6048	Dues, Licenses and Subscriptions

***** Please ensure that you have included the cost of all staff attendees in your travel budgets, and estimate the date of each expense. Since travel costs change, the Travel Authorization form acts as a budget adjustment form. Details on this form are provided later in this Handbook.

Technology / Software and Web

Expense Codes

6090	Telecommunications- Network Service
6092	Telecommunications - Phone/ Fax Service
6095	Domain Name Lease Expense
6096	Web Development & Data
7000	IT Services
7001	Information Technologies - Other
7002	IT Equipment and Repair
7006	Software Expense
7011	Professional Services-Hosting IT

***** Most IT expenses will be coded as a professional service. Please consider replacement laptops and other equipment purchases.

Human Resources and Payroll

Expense Codes

7009	Insurances - Liability	**6015**	Profit Share
8101	Wages - Regular	**6016**	Long Term Disability Insurance
8102	Wages - Overtime	**6017**	Background Checks
8103	Wages - Bonus	**6019**	Short term Disability Insurance
8104	PTO Leave	**8140**	Professional Payroll Processing
8110	WC Self-Insured	**7027**	Professional Services-Payroll Fee
8115	Group Health		
8120	Life, AD&D		
8125	401(K)		
8129	Personnel Recruiting		
8130	Payroll Taxes		
8131	Drug Test, Background & Assistance		
8132	Personnel - Employee Morale		
8134	Personnel Employee Assistance		
6000	Regular Salary/Hourly Expense		
6001	PTO Expense		
6002	Bonus Expense		
6004	Overtime Pay		
6005	Flex Time		
6006	Holiday/Bereavement		
6007	Employer Payroll Taxes		
6008	Unemployment Expense		
6009	Insurance Premium - Medical		
6010	Insurance Premium - Vision		
6011	Insurance Premium - Dental		
6012	Insurance Premium - D&O		
6013	Employer Match 401K		
6014	Worker's Comp Insurance		

Budgeting for Other Departments

Cross-departmental projects should be coordinated before submission to the budget. However, there are certain expenses (programming expenses, marketing expenses) which are difficult to estimate without strategic collaboration with that department.

To enable Project Leads to proceed with budgeting for these expenses without exact estimates, **placeholder codes** can be used and then adjusted at a later date. These codes signal to another department that they have a fiscal expectation to work on a project.

For example, if you budget using code 6042 (Advertising and Marketing), that budget item will appear in the Marketing department budget (16). This allows for more informed spending for specialized purchases by a department. A list of other codes that work like this are shown below:

1. 6042 Advertising and Marketing (sweep to department Marketing)
2. Any fundraising revenue (sweep to department Fundraising)
3. Any personnel expenses (sweep to department Human Resources)
4. 6037 Programming Expense (sweep to department Public Programs)
5. Any software expense multiple departments (sweep to Building)
6. Any membership in multiple departments (sweep to Building)
7. Office equipment, repairs, postage, or maintenance (sweep to Building)

Other codes can be set up to function as such, per the coordination of Directors. Please contact the Budget Committee if you would like to add more codes to this list.

Creating New Account Codes

New account codes can be created on an approval basis. Please contact the Finance team to request new account codes. Alternatively, they may be able to suggest a use case for an existing account code.

Revenue Code Distributions

Code Number	Code Name	Department(s)
4105	Admissions – Ticket Program	Public Programs
4110	Admissions – Group Sales	School and Tour Programs
4115	Admissions – Special	Public Programs; Fundraising
4355	FAMCamps	FAMCamps
4360	Booth Rental	Public Programs
4425	Parking Revenue	Security
4100	Admissions – General	Guest Services
4300	Museum Shop POS Revenue	FAMStore
4350	E-Commerce/Shop Revenue	FAMStore
4010	Grant Revenue	Fundraising
4135	Government Revenue	Fundraising; Finance
4600	Endowment	Fundraising; Finance
4120	Individual Donations	Fundraising
4125	Corporate Donations	Fundraising
4130	Foundation Donations	Fundraising
4131	Board Member Donations	Fundraising
4132	Honor/Memorial Donation	Fundraising
4133	Planned Gifts	Fundraising
4134	Ticket Add-On Donation	Fundraising
4137	Tribal Donations	Fundraising
4140	Capital Pledges	Fundraising
4200	Memberships	Development
4210	Corporate Sponsors	Fundraising
4211	Tribal Sponsorships	Fundraising
4261	Membership Events	Development

VII | New Projects

The Project Proposal Form (PPF) establishes a standardized approach for developing, reviewing, and approving new projects across FAM. It ensures that all projects are evaluated for strategic alignment, feasibility, financial impact, and interdepartmental collaboration before inclusion in the annual budget. Once approved, it serves as a comprehensive resource for supporting the good work of all departments.

All projects must go through the two-part proposal process (PPF1 and PPF2) for approval.

PPF1: Strategic Alignment

Annual Deadline: December 19th

Annual Review Period: January 15 –31

Required Components:

1. Project Title and Lead: identify the staff member coordinating the proposal. If the Project Lead is not the Director of the division, the Director's signature and approval is required at this stage. Sign off from other directors is not required until PPF2.
2. Project Duration: Select the time-length of your project.
3. Estimated Budget: A general cost-estimate. Does not have to be specific.
4. Justification: A brief narrative explaining your project.
5. Strategic outcomes: List three outcomes demonstrating how the project supports FAM mission and strategic plan.
6. Departmental Needs: identify all departments expected to contribute time or resources to this project.

The Executive Office Manager will schedule a series of PPF1 reviews from January 15th – January 31st. This is an opportunity for the Project Lead and/or Director to "pitch" the project and its impact. Approvals and suggested edits to the project will be communicated by the Executive Office Manager. This preliminary approval is permission to continue with planning and advance the project to PPF2, **but it is not a final approval.** Final approval is contingent on completion of PPF2 and the discretion of the Budget Committee.

***See Appendix:**

- **PPF1 Blank Template**
- **PPF1 Approval Rubric**

PPF2: Logistical Planning and Budget Development

Annual Deadline: March 2

Annual Review Period: March 2 – April 30

Required Components:

1. Detailed Budget: Ensure that the project is fully budgeted for you in your annual budget worksheets, which are due on the same day.
2. Departmental Impact: Estimate staff time and resource requirements by department.
3. Justification: Narrative explanation of expenses and revenues and sustainability.
4. Project Narratives and Objectives: In more detail, describe the project's purpose, goals, and success measures. This will double as a language asset for supporting departments (i.e. Fundraising, Public Programs...)
5. Activities and Timeline: Outline milestones and deliverables.
6. Funding Strategy: Identify funding sources or strategic fundraising leads.
7. Target Audience and Messaging Strategy: Define who the project will reach and how.
8. Marketing Needs: Identify the support requested from Marketing.
9. Sign-offs from all involved directors.
10. Appendices: Attach supporting documents such as letters of support, W9s, resumes, or any other proposal documents.

The Budget Committee will review all proposals and release a list of approved projects no later than April 30th. Finance will prepare final budget reports to be delivered no later than June 1. Additional edits may be requested by the Board. Spending may begin on the project on July 1 of its anticipated year.

***See Appendix:**

- **PPF2 Blank Template**
- **PPF2 Approval Rubric**

Recurring Projects

Recurring or established projects **do not require a new Project Proposal form.** However, their budgets **must be estimated annually** in the budget worksheets. A list of recurring projects is provided below for your reference:

Code	Project Name	Project Type
1025	Sponsored School Admission	Admissions and Ticketing
1060	Bank of America Museums On Us	Admissions and Ticketing
1010	Summer FAMCamps	Camps
1137	Spring FAMCamps	Camps
1147	FAM Center Renovations	Construction Project
1252	Signage	Construction Project
1151	All Staff/ Board Meetings	Executive Project
1152	Legal	Executive Project
1239	Conferences	Executive Project
1253	Softball League	Executive Project
1011	OKLA HOMMA	Exhibit/Gallery
1065	Zarrow Case Work	Exhibit/Gallery
1139	Family Engagement Programming	Exhibit/Gallery
1205	AIAHOF – Tribal Nations Gallery	Exhibit/Gallery
1264	AIAHOF – Community Gallery	Exhibit/Gallery
1204	Cradleboards	Exhibit/Gallery
1206	Route 66	Exhibit/Gallery
1210	WINIKO: Life of an Object	Exhibit/Gallery
1244	NMAI Rotation	Exhibit/Gallery
1057	39 Enterprises	Finance Project
1248	Stewardship and Donor Development	Finance Project
1027	Capital Construction Campaign	Fundraising Campaign
1028	Opening Day Campaign	Fundraising Campaign
1029	FDC Capital Campaign	Fundraising Campaign
1040	Five Moons Theater Campaign	Fundraising Campaign
1048	FDC Experience Enhancement	Fundraising Campaign
1054	General Giving	Fundraising Campaign
1055	Annual Giving Campaign	Fundraising Campaign
1072	Giving Drive	Fundraising Campaign
1254	Indian Removal Act 2030	Fundraising Campaign
1255	Endowment	Fundraising Campaign
1256	Changing Gallery Campaign	Fundraising Campaign
1260	Giving Society	Fundraising Campaign
1240	Where Earth Meets Sky Gala	Fundraising Event
1049	Chef’s Garden	Internal Program
1128	Docent Programs	Internal Program
1129	Educator Programs	Internal Program

1131	Other Public Programs	Public Program
1132	Teen Guides & Teen Programs	Internal Program
1156	Memorial Marathon	Internal Program
1159	Leadership Book Club	Internal Program
1162	Donuts with Leadership	Internal Program
1229	Internship Program	Internal Program
1265	Ghost Contracts	Marketing Initiative
1266	FDC Tourism	Marketing Initiative
1267	39 Tourism	Marketing Initiative
1073	Annual Report	Marketing Initiative
1167	Newsletter	Marketing Initiative
1014	Membership – FAM Founder	Memberships
1015	Membership – FAM Donor	Memberships
1017	Membership – FAM Duo	Memberships
1018	Membership – FAM Household	Memberships
1019	Membership – FAM Patron	Memberships
1020	Membership – Super FAM	Memberships
1021	Membership – Circle of Honor	Memberships
1062	Membership – FAM Sponsor	Memberships
1261	Membership – FAM Supporter	Memberships
1070	Membership Events	Memberships
1071	Membership Drive	Memberships
1044	Online Educator Resource	Product Development
1063	WINIKO: Reunions Book	Product Development
1064	WINIKO: Reunions Film	Product Development
1263	AIAHOF – Operations and Web Dev	Product Development
1245	Moundpath Video	Product Development
1047	Indigenous Peoples Day	Public Program
1133	TEK Fest	Public Program
1134	Summer Solstice Celebration	Public Program
1136	Winter Solstice Celebration	Public Program
1143	Night Market	Public Program
1166	Winter Holiday Art Market (WHAM)	Public Program
1045	WINIKO: Reunions Research	Research
1148	Employee Retreats	Staff Training and Development
1154	New Hire Resources	Staff Training and Development
1236	Lunch N Learn	Staff Training and Development
1138	Composition Academy	Workshop or Class

VIII | Dashboards, Reporting and Financial Edge

Dashboards and reports can be very helpful to you! When used consistently, they can help staff and leadership monitor the organization's financial health all year long. They are your go-to for the most updated information on budgets, expenses, revenues, and project performance.

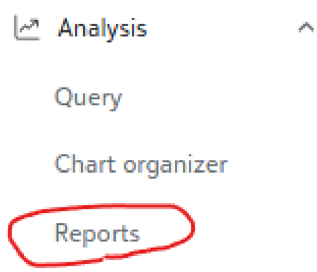
In addition to this guide, finance staff are available to meet 1:1 to set up custom reports and train on dashboard utilization.

There are three levels of dashboards used in the budget process. Each serve a distinct purpose:

Dashboard	Platform	Purpose	Access
Budget Dashboard	SharePoint Site	Central hub for all budgeting tools, forms, and key resources. Includes quick links to project proposal forms and adjustment forms. Also includes links to tutorial videos and guides.	Accessible to all staff who have a link to the Intranet.
Division Budget Dashboards	Sharepoint Site	Provides division-specific information, including Financial Edge queries filtered by division and custom guidelines. Also includes a form to request the development of custom reports.	Accessible to each Division Director and relevant staff at the discretion of the Director.
Financial Edge (FENXT) Dashboards	Financial Edge NXT	Displays real-time financial data to provide visual summaries of spending and revenue.	Accessible to all Directors with FENXT access. Link to this dashboard is provided in the Division Dashboards.

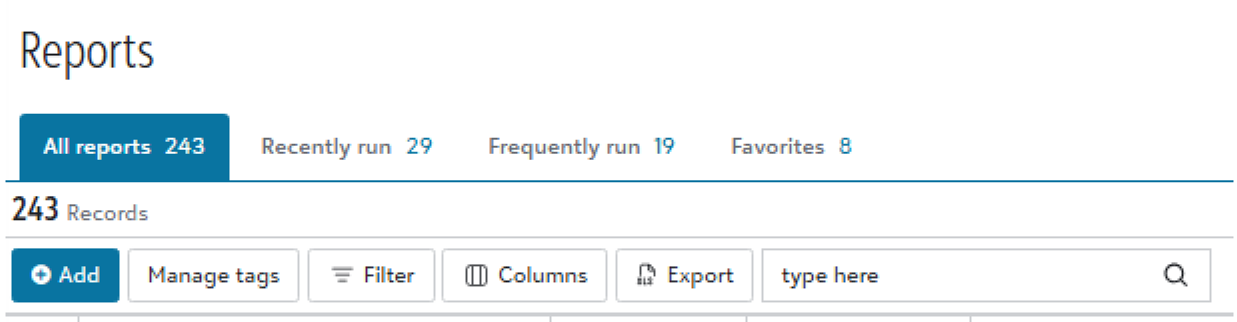
Generating Custom Reports in Financial Edge

Your best bet for obtaining real-time information and reports is through Financial Edge custom reports. These are located in Financial Edge under the Analysis tab.

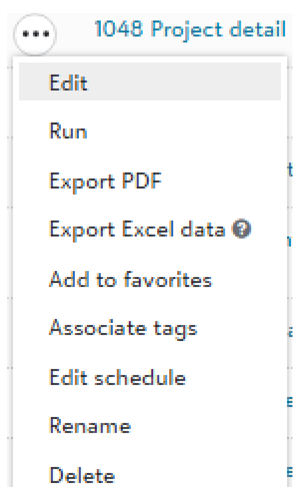


Finance has created a set of default custom reports for each Division. **You will need to find them and select them as a favorite.**

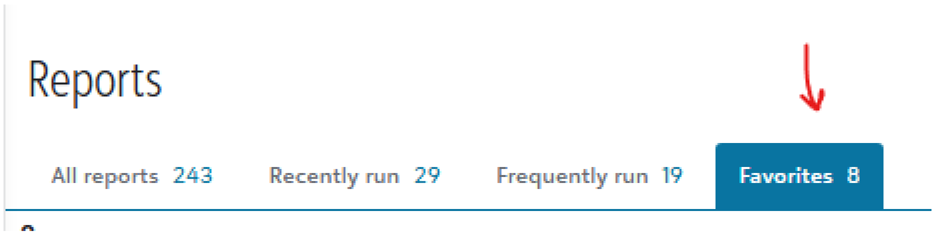
1. Search for the name of your Division or Department



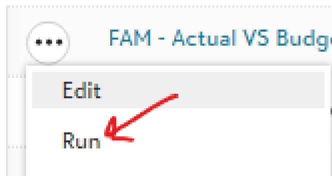
2. When you find a report you would like to save as a favorite, select the ellipsis menu (three dots) next to the report name and click "Add to favorites"



3. Now the report is saved to the favorites tab at the top of the screen. You can click on the "Favorites" button to view all your favorites.



4. Now, you can run this report whenever you would like. It will populate with the most recent information. To run the report, click on the ellipses menu next to the report name and select "Run"



You can also request that Finance creates a new report for you to run whenever you want. The form for this request is centrally located in both the Budget Dashboard and the respective Division Dashboards.

Types of Reports Available

Budget vs. Actuals	Tracks budget against actual expenses and revenue by account code.
Project Budget vs. Actuals	Tracks budget against actual expenses by project first, then account code.
General Ledger (GL) Report	Lists all transactions, invoices, and vendor payments.
Grant Reports	Created after the grant awards meeting, these reports track grant expenditures and compliance.

IX | Making Adjustments

Adjustments are a normal, expected, and essential part of the annual budget process. The adjustment system we have in place ensures that all changes to approved budgets are documented, reviewed, and approved quickly.

Key Terms

Adjustment – *A formal change to an approved budget after it has been finalized. Adjustments may involve shifting funds between line items, adding new expense, or updating revenue projections.*

Budget Adjustment Form – *The official document used to request and justify any mid-year budget changes.*

Line Item – *A specific expense or revenue category within a budget. Each line item has a unique account code used for tracking in Financial Edge.*

Adjustment Scenario – *The classification system used to determine the type of budget change.*

When do I submit an adjustment?

- If there is a change to an approved budget line item.
- If a **significant** new expense or revenue line is introduced.
- A project's scope or funding source changes after approval.

What makes a change significant?

Please refer to the following scenarios to know when an adjustment is needed:

Scenario	Description	Form(s)	Approvals	Example
< or = 10% Adjustment on a Line Item	Small Budget Change within an existing line item (e.g., price fluctuation, small fee)	Optional Budget Adjustment Form	No formal approval needed per Director discretion.	Paper costs increases 5% due to supplier changes.
> 10% Adjustment on a Line Item	Moderate change to an existing line item that materially impacts budget totals.	Budget Adjustment Form	Finance Director, Executive Director	Vendor costs for marketing contract increase 20%.
New Line Item	Addition of a new cost or revenue line within an existing project or department.	Budget Adjustment Form	Finance Director, Executive Director	Department adds a new software subscription.
New Project	Entirely new initiative requiring its own budget and cross-departmental sign-offs.	Project Proposal Form (PPF1 &2) + Budget Adjustment Form	All impacted Directors, Finance Director, Executive Director	New exhibit or partnership event added mid-year.

How are Adjustments Approved?

1. Director completes and submits the online Budget Adjustment Form. For new projects, the Project Proposal Form is attached to the adjustment.
2. Finance and Development Administrator presents any new adjustments to the Director of Finance and the Executive Director every **Tuesday at 1pm.**
3. Approval/Rejection email is sent to the Director by the Executive Office Manager.
4. If approved, Finance and Development Administrator updates Financial Edge budgets.

How to Calculate Adjustment %

To determine whether a change qualifies as < or = 10% or > 10%, use this formula:

$$\text{Adjustment \%} = \frac{\text{Adjusted Amount} - \text{Original Amount}}{\text{Original Amount}} \text{ X } 100$$

How do I access the forms?

The Project Proposal Form (PPF1 & PPF2) **are the same** as the form used in the annual budget review process. You can access this form, as well as the link to the web-based adjustment form in the **budget dashboard.**

X | Travel Authorization

Traveling for work is an important privilege granted to all FAM staff. However, an authorization process must be followed to ensure the safety and financial accountability of travelers. The conditions for paid travel include:

- ✓ Attending a conference
- ✓ Attending a training
- ✓ Meeting with stakeholders or stewarding relationships
- ✓ Program or project implementation
- ✓ Community and public engagement
- ✓ Any other approved special travel agreement

Procedure for Travel Authorization

1. The procedure begins after a travel budget has been approved in the annual budget worksheets. All required travel expenses must be estimated in the budget, and no spending can proceed without budget approval by the Board in June.
2. 90 days prior to the date of travel, an Advanced Travel Authorization Form must be submitted to the Executive Office Manager. This form designates who is traveling, what expenses may have changed, and notifies Finance of any need to issue per diem.
3. The Executive Office Manager presents the form to the Executive Director, who approves the form. The approved form is sent to the Finance and Development Administrator and the requesting Director.
4. The Director adds the dates of travel to the shared calendar. Finance makes any necessary budget adjustments and Payables issues per diem.

Appendix

E Travel Authorization Form

XI Appendix

APPENDIX	NAME
A	PPF1 (Project Proposal 1)
B	PPF1 Approval Rubric
C	PPF2 (Project Proposal 2)
D	PPF2 Approval Rubric
E	Travel Authorization Form

A: PPF1 (Project Proposal Form 1)

Project Proposal Forms (PPF1 & PPF2)

Welcome to the official Project Proposal Form of First Americans Museum Foundation. This form serves as a shared tool for outlining new projects, identifying key resource needs, and ensuring supportive communication between teams.

This form cannot be filled out at once. It is designed to be completed in stages and in conversation with others. All sections must be completed to be considered for Executive approval. Approval rubrics follow each section of the form.

In alignment with the strategic annual budgeting process, new projects will be introduced and approved through the following fiscal year calendar.

November 3: Budget Worksheets distributed to Directors

January 19: Deadline to submit Project Proposal Part 1

January 30: Deadline for Part 1 Approvals

March 2: Deadline to submit Project Proposal Part 2

April 30: Budget Committee concludes final approvals

June 1: Deadline to deliver new fiscal year budget

**Please see Budget Handbook for a full calendar*

What is a project?

A project is any initiative, program, exhibit, event, or committee, that requires staff time from more than one department. Projects may be one time, annual, or multi-year. Nomenclature is defined in accordance with the FAM annual budget, accounting, and audit requirements. Expenses contained within one department are otherwise defined as Core Support.

PPF1: Project Proposal for Strategic Alignment

1. Project Title

What will your project be called?

2. Project Lead

Who is leading the initial development of this project?

Job Title *Last Name* *First Name*

3. Project Duration

☐ One-time event 4.a Project Start Date

☐ Annual 4.b Project End Date

☐ Multi-Year

Which years?

4. Predicted Project Budget Total

What is the sum of all predicted expenses related to this project?

5. Justification

Please write a short narrative justification for this project.

6. Strategic Outcomes

Please list three outcomes of this project that support the strategic goals of First Americans Museum.

Outcome 1

Outcome 2

Outcome 3

7. Please identify potential needs to ensure the success of your project.

- ☐ Cultural Consultation
- ☐ Language Consultation
- ☐ Tribal Nation Contacts
- ☐ Gallery Narratives or Content
- ☐ Gallery Access
- ☐ Photography or Media
- ☐ Graphic Design
- ☐ Marketing
- ☐ Fundraising
- ☐ Programming
- ☐ Web Development
- ☐ Social Media
- ☐ Custodial
- ☐ Community Contacts
- ☐ Media Contacts
- ☐ Corporate Partnerships
- ☐ Human Resources
- ☐ IT / AV
- ☐ Accounting
- ☐ Government Contacts
- ☐ Executive Management
- ☐ Meeting Spaces
- ☐ Board Member Contacts
- ☐ Memberships
- ☐ Legal
- ☐ Guest Services
- ☐ Events / Event Space
- ☐ Catering
- ☐ Restaurant
- ☐ Security
- ☐ Software Development
- ☐ Facilities

B: PPF1 Approval Rubric

RFP1 Executive Approval Rubric

Criteria	Exceeds Expectations (3 pt)	Meets Expectations (2 pt)	Needs Improvement (1 pt)	Missing/Incomplete (0 pt)
Project Concept Clearly Defined	Project idea is clear, specific, and well-articulated with a defined purpose.	General concept provided with minor gaps in clarity.	Project unclear, overly broad, or lacks focus.	Concept missing or incomplete.
Preliminary Budget Scope Reasonable	Estimated cost appropriate for project scale and realistic for department capacity.	Budget estimate provided needs refinement.	Estimate unrealistic or incomplete.	No estimate included.
Justification Clearly Articulated	Compelling rationale for the project's needs, timing, and expected impact.	Rationale adequate but not fully developed.	Justification weak, unclear, or lacks evidence.	No justification provided.
Anticipated Outcomes Identified	Outcomes are specific, measurable, and clearly tied to strategic goals.	Outcomes identified but broad or not measurable.	Outcomes vague or disconnected from project.	No outcomes listed.
Interdepartmental Needs Identified	All relevant anticipated activities are anticipated.	Most anticipated activities are listed, with a few missing to fulfill the project.	Limited identification of collaborative needs.	No interdepartmental needs mentioned.
Alignment with Strategic Priorities	Strongly supports institutional goals and advances mission-driven outcomes.	Generally aligns but lacks detail or depth.	Weak or indirect connection to organizational priorities.	No alignment identified.
Total	Points:	Points:	Points:	Points

16-18 Points – Excellent: Concept is clear, strategic, and well-justified. Minimal edits required. Auto-advance to RFP2.

12-15 Points – Adequate: Concept meets expectations but requires minor revisions or clarification. Advance per Executive approval.

7-11 Points – Weak: Concept has significant gaps in clarity, justification, or alignment. Hold for revisions, may resubmit next cycle.

0-10 Points – Incomplete: Concept missing essential information or lacks strategic alignment. Not ready for advancement.

Budget Summary Comparison

Category	Project Budget	Overall Department Budget	% of Department Budget
Total Cost			
Estimated Income			
Net Impact (Cost-Income)			
Staff Time Estimate (Hours)			

Strategic Alignment Scorecard

Strategic Goal	Direct Alignment (Y/N)	Strength of Alignment
Enhance Visitor Experience		**NONE – LOW – MEDIUM - HIGH**
Nurture Ties with Tribal Communities		
Enhance Facilities and Operational Stability		
Increase Museum Visibility		
Increase Financial Strength		

Executive Review Notes

Decision

☐ **Approve – Full approval without conditions.**

☐ **Approve – Contingent on the completion of conditions (see below)**

☐ **Defer – Reassess for future budget year.**

☐ **Reject – Project is not feasible at this time.**

Approval Conditions

Condition	Deadline

By signing below, I affirm that I have reviewed the charter, assessed its financial and operational impact, and am committing to decision as marked above.

Dr. Kelli Mosteller Executive Director

Signature ______________________________

Date ______________________________

C: PPF2 (Project Proposal Form 2)

PPF2: Planning and Approval

Budgeting

Please use the following budget form for your project. For budgets that exceed the capacity of this form, you may attach a copy of an excel budget to this form.

Guidelines

1. Please consider all potential interdepartmental needs of your project. If staff time can easily be calculated, please include it.
2. Refer to the official account codes for expense and revenue.

EXPENSES

AMOUNT	EXPENSE CODE	COST DESCRIPTION
$		
$		
$		
$		
$		
$		
$		
$		
$		
$		
$	Total	

REVENUE

AMOUNT	REVENUE CODE	REVENUE DESCRIPTION
$		
$		
$		
$		
$		
$		
$		
$		
	Total	

Budget Justification

Please write a short narrative justification of your project expenses and revenue.

Departmental Impact Worksheet

Department Segments	Impact Level	Est. Staff Time (hrs)
Custodial	NONE-LOW-MED-HIGH	
Security		
Maintenance		
Facilities		
Curatorial Affairs		
Guest Services		
FAM Store		
Marketing and Communications		
39 Restaurant		
39 Café		
Catering		
Events		
School and Tour Programs		
Public Programs		
FAM Camps		
Family Engagement		
Human Resources		
Finance		
Development		
Fundraising		
Executive		

Budget Impact

To the best of your knowledge, are all departmental expenses required for this project reflected in the project budget?

No

If no, please explain.

Narratives and Project Management

Project Narratives

Please describe the context and need for the project. Explain how the project aligns with the mission of FAM, the present moment, and our strategic goals. If additional narratives exist, please attach them to this form.

Objectives

List specific, measurable, and achievable objectives and goals for this project. What do you want to achieve, and how will you ensure that you achieve it?

Activities and Timeline

Outline key activities and their respective timelines. Include milestones and deliverables.

Progress Tracking

Explain how successes will be measured and tracked.

Funding Strategy

Please indicate the funding source(s) for your project.

- ☐ Core Support
- ☐ Fundraising – Grants
- ☐ Fundraising – Donations
- ☐ Fundraising – Sponsorships
- ☐ Fundraising – Government
- ☐ Fundraising – Tribal

Fundraising Strategy

If applicable, please list any leads or strategic fundraising goals you have anticipated for this project.

Target Audience

Define the primary and secondary audiences for this project. If there is a specific community, tribal nation, or group you can identify, please be sure to highlight them here.

Messaging Strategy

Outline key messages and narratives to be communicated to the public.

Additional Marketing Support Needed

Specify any specific resources or assistance required from the marketing team. If selected, please include in your budget.

- ☐ N/A
- ☐ Social Media Ad
- ☐ Google Ads: Display
- ☐ Google Ads: Search
- ☐ Earned Media: Broadcast
- ☐ Earned Media: Online Listing
- ☐ Earned Media: Social Media
- ☐ Email Marketing
- ☐ SMS Text
- ☐ Website Listing
- ☐ Digital Billboards
- ☐ Print Advertising
- ☐ Broadcast Radio
- ☐ Print Editorial
- ☐ Print Advertising
- ☐ Direct Mail Advertising
- ☐ Television Advertising

Appendix

*Please **list** any attached supplementary materials, such as W9s, marketing content, letters of support, resumes, or additional budgets.*

Additional Needs

Are there any additional needs not yet mentioned in this proposal that will be required to successfully support your project?

Signatures

Project Lead

I certify that I have completed the Project Proposal Form to the best of my ability, and have consulted with all collaborative departments to provide the most accurate estimates. I have reviewed the Project Proposal rubric to ensure that my proposal is ready for Executive approval.

Project Lead Name

Project Lead Signature

Date

Division Collaborators

I certify that I have reviewed the Project Proposal, and to the best of my ability, have communicated all potential feasibility concerns. I hereby commit to integrating this project into our processes.

Operations

Director Name

Director Signature

Date

Finance

Director Name

Director Signature

Date

Curatorial Affairs

Director Name

Director Signature

Date

Institutional Advancement

Director Name

Director Signature Date

Marketing and Communications Manager

Manager Name

Manager Signature Date

Learning and Community Engagement

Director Name

Director Signature Date

Human Resources

Director Name

Director Signature Date

39 Enterprises

Director Name

Director Signature Date

D: PPF2 Approval Rubric

RFP2 Approval Rubric

Criteria	Exceeds Expectations (3 pt)	Meets Expectations (2 pt)	Needs Improvement (1 pt)	Missing/Incomplete (0 pt)
Complete Budget Information Provided	Detailed, itemized, realistic expenses and income projections.	Mostly detailed; minor gaps in line items or notes.	Budget unclear, unrealistic, or lacking backup information.	Budget missing or unusable for decision-making.
Total Financial Impact Reasonable	Project total is appropriate to scope and fits department expectations.	Financial impact acceptable but could be optimized.	Financial impact seems excessive or poorly justified.	Financial impact unclear or unjustifiable.
Sustainability (Future Year Impact)	Clear plan for ongoing costs or phased sustainably (if applicable)	Some thought given to future-year costs.	No clear plan for sustainability.	Future cost impact missing.
Revenue Sources Clearly Defined	Income sources (ticket sales, grants, sponsorships, etc) are listed and realistic.	Income sources listed but minor gaps.	Income sources vague or overly optimistic.	No revenue plan identified.
Staffing Impact Fully Considered	Staffing and internal cost estimates are complete and realistic and include all relevant departments.	Most major internal costs listed.	Staffing/facilities cost assumptions incomplete.	Internal costs ignored.
Alignment with Strategic Priorities	High impact aligned with multiple strategic goals or reasonable cost.	Moderate impact for cost.	Low strategic impact compared to cost.	Strategic alignment unclear or poor.
Progress Tracking Clearly Defined	Clear, measurable outcomes and KPIs are listed with a timeline for evaluation.	Basic performance indicators and plan for tracking progress.	Identifies general goals but does not include measurable indicators methods.	No progress tracking or evaluation plan provided.
Funding Pathway Realistically Identified	Funding pathway (core support, grant, donor, deferred is logical and feasible)	Pathway possible but weakly justified.	Funding plan risky or unclear.	No funding pathway proposed.
Audience and Communications Planning Anticipated	Clearly defines target audiences and messaging aligned with mission, realistic marketing needs identified	General audiences identified, messaging and marketing plans included but lack detail.	Audience vague or broad; unclear messaging or unrealistic marketing needs.	No audience, messaging, or marketing information provided.
Signatures Complete	All required Directors have signed. Demonstrates clear interdepartmental coordination and readiness.	Most signatures obtained; minor follow-up or clarification needed.	Some signatures missing or incomplete; unclear whether all impacted divisions reviewed.	No signatures provided or evidence of departmental review.
Total	Points:	Points:	Points:	Points

Score Card

27-30 Points – Excellent: Proposal is comprehensive, financially sound, and strategically aligned.

21-26 Points – Adequate: Proposal meets expectations but has minor gaps or areas needing clarification.

12-20 Points – Weak: Proposal demonstrates partial readiness; major revisions needed to address feasibility, financial accuracy, and collaboration.

0-13 Points – Incomplete: Proposal missing essential information or shows insufficient planning for financial or strategic feasibility.

Budget Summary Comparison

Category	Project Budget	Overall Department Budget	% of Department Budget	% of Fundraising Budget
Total Cost				
Estimated Income				
Net Impact (Cost-Income)				
Staff Time Estimate (Hours)				

Strategic Alignment Scorecard

Strategic Goal	Direct Alignment (Y/N)	Strength of Alignment
Enhance Visitor Experience		**NONE – LOW – MEDIUM - HIGH**
Nurture Ties with Tribal Communities		
Enhance Facilities and Operational Stability		
Increase Museum Visibility		
Increase Financial Strength		

Executive Review Notes

Decision

☐ **Approve – Full approval without conditions.**

☐ **Approve – Contingent on the completion of conditions (see below)**

☐ **Defer – Reassess for future budget year.**

☐ **Reject – Project is not feasible at this time.**

Approval Conditions

Condition	Deadline

By signing below, I affirm that I have reviewed the charter, assessed its financial and operational impact, and am committing to decision as marked above.

Dr. Kelli Mosteller **Executive Director**

Signature ______________________________

Date ______________________________

E: Travel Authorization Form

EMPLOYEE ADVANCED TRAVEL AUTHORIZATION FORM

First Americans Museum Foundation

Purpose & Use: All in-state and out-of-state travel requiring 8 hours or more away from FAM requires prior authorization. Please estimate allowable travel costs and submit this form for approval at least two weeks prior to the event and prior to the commitment of funds.

Employee Name			
Estimated Departure Date		Estimated Departure Time	
Estimated Return Date		Estimated Return Time	
Explanation of Travel Request, Destination *(When possible, attach tentative meeting agenda, conference brochure, etc.)*			

Estimated Travel Costs:				
Total Mileage X .67 Rate Per Mile =				$
Air Travel				0
Ground Transportation (to/from airports, hotels, taxis to scheduled meetings)				0
Parking				0
Tolls				0
Car rental				0
Lodging (Only 24 hrs. prior to and following meeting are allowed.)				$
Number of Travel Status		x Per Diem Rate (Meals & IE-$64)	Total Estimated Per Diem Meal Allowance (Less any meals provided)	$
Days	Hours			
5		$64		
Registration Fee				0
Other - Explain				0
TOTAL ESTIMATED TRIP COSTS:				**$**
Department Expense: Is this travel reimbursable?				**YES** ☐ **X** per diem **NO** ☐ **X**

Employee Signature Date

Director Signature Date

For Finance Budgetary Use:			
Date Rec'd	Funding Source	Bank Account Ending	Available Funds Verified By:

☐ Approved ☐ Disapproved

Executive Director Signature Date