

Sample Budget Narrative/Justification⁺

THE HEALTH COALITION
Reducing Environmental Health Risks Project
January 1, 2011 to December 31, 2011

The Health Coalition request to the ABC Foundation is \$120,000 for the period January 1 – December 31, 2011. The total budget for the Reducing Environmental Risks Project is \$231,186. If awarded, ABC Foundation funds will be matched by a \$75,000 grant from the Community Health Foundation (in-hand), and \$36,186 organizational cost share supported by the Health Coalition annual operating budget.

PROJECT PERSONNEL⁺⁺

Executive Director (10% FTE) will review all protocols, monitor project timeline and activities, and oversee budget expenditures and reporting. She will supervise the Project Director and Research Director, and ensure integration of proposed activities into the continuum of services provided by the Health Coalition. The Health Coalition will contribute all costs associated with the Executive Director's work on the project.

Project Director (30% FTE) will train and supervise Community Organizers, oversee community asset mapping activities, and ensure accuracy of GIS data and maps. The Health Coalition will support a portion of the Project Director's time devoted to the project.

Community Organizers (2 @50% FTE) will recruit, supervise, and support 30 Community Leaders and work with schools and community-based organizations to develop afterschool education programs and community-wide hazard control programs.

Research Director (50% FTE) will compile data and analyze health effects of the Reducing Environmental Health Risks project. She will divide her time between providing technical assistance to other staff on health and hazardous materials issues and assisting community members who seek help on a wide variety of toxic related problems. The Community Health Foundation grant will support the Research Director's activity on the project.

Research Assistant (30% FTE) will assist the Research Director in compiling data and analyzing health effects of the Reducing Environmental Health Risks project. The Community Health Foundation grant will support the Research Assistant's activity on the project.

Fringe Benefits: The Health Coalition fringe benefit rate is 28% for all personnel costs.

⁺⁺All salaries factor a 3 percent increase effective July 1.

Other Personnel

Community Leaders (30) will conduct door-to-door outreach with community residents. Each will receive a \$250 stipend to help defray any expenses related to their participation in the project.

OTHER DIRECT COSTS

Project-related Telephone: Phone charges are calculated at \$80/mo x 12 months. The Community Organizers will share a dedicated project phone line. The Research Director and Research Assistant also will share a line. The Health Coalition will cover all these costs.

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Project-Related Supplies: Office supplies (\$3,000) for project staff and activities, which include paper, file folders, 3-ring binders, pens, presentation pads, and markers, are budgeted according to an allocation formula that is consistently applied across all Health Coalition projects. Other supplies are hands-on science and art supplies (\$2,280) for afterschool programs and rolling carry cases for the Community Organizers (2x \$42). The Health Coalition will contribute 50 percent of project supply costs.

Printing/Duplication: Cost of copying and supplies for copy machine and printer (toner, printer cartridges, and diskettes) are budgeted at \$84.50 per month x 12 months. Costs include project-related correspondence and reports, educational materials, and the 4,000 community health assessment questionnaires, which will be printed in-house. The Health Coalition and The Community Health Foundation grant will support these costs.

Postage: The community health assessment questionnaires will be sent by regular mail. The questionnaire is an integral component of the project activities as outlined in proposal. The total number of questionnaires to be mailed are 4,000 @ \$0.44 = \$1,760.

Equipment (non-capitalized): A desktop computer with printer, budgeted at \$1,250, will house the community asset mapping GIS software upgrade (\$2,500). The GIS software requires additional capacity and faster processor speed and upgraded printer. The GIS software upgrade will allow us to link assets and needs in XYZ Health Coalition neighborhoods. The software will be purchased with Community Health Foundation funds.

Travel: The Project Director, Research Director, and a Community Leader elected by his/her peers, will travel to Chicago to attend the two-day National Conference on Community Responses to Environmental Health Risks. Round trip airfare is budgeted at \$350 per person based on current Expedia fares. Lodging, meals, and incidentals are based on the GSA per diem for Chicago in June (\$282); 6 days are budgeted (2 per person) at \$1,692. The Community Health Foundation grant will support all conference travel costs.

Meetings and Conferences: Ten meetings are budgeted (\$374 per meeting) including \$224 for working lunch (32 x \$7 per meal); \$100 room rental; and \$50 for AV equipment. The Community Organizers will engage and provide technical assistance and training to Community Leaders in the day-long (6 hours) meetings. The National Conference on Community Responses to Environmental Health Risks registration fees (3 x \$150) will be supported by the Community Health Foundation.

Consultants and Contracted Services: An independent contractor will provide translation services during community meetings (\$25 hour x 60 hours). A GIS Software Support and Service Package (\$1,000) includes training for Health Coalition staff.

Other Costs: Community Organizers will travel in and transport Community Leaders in the Health Coalition van. Costs are budgeted at \$178 per month for expanded vehicle/liability insurance coverage, fuel, and maintenance. The Health Coalition will cover these costs.

Subcontracts: Super University will design an evaluation of the project and train staff to implement the evaluation. The subcontract budget is \$10,000. See Attachment A for Super University's detailed scope of work and budget.

Indirect costs are calculated at 15% of total costs, excluding the subcontract to Super University.

⁺Adapted from sample budget narrative in a previous version of the California Endowment's *Grant Application Guide*.

Applicant: XYZ Health Coalition
Project: Reducing Environmental Health Risks
Project Period: January 1, 2011 to December 31, 2011
Grant Request from ABC Foundation: \$120,000

| | ABC FDN. Grant Funds Requested | OTHER PROJECT SUPPORT | | TOTAL PROJECT BUDGET |
|--|--------------------------------------|-----------------------|-----------------|-------------------------|
| | | Health Coalition | Other Funds | |
| PERSONNEL COSTS | | | | |
| Executive Director 10% FTE | | \$10,200 | | \$10,200 |
| Project Director 30% FTE | \$18,947 | \$9,473 | | \$28,420 |
| Community Organizers 2 @ 50% FTE | \$40,600 | | | \$40,600 |
| Research Director 50% FTE | \$0 | | \$35,450 | \$35,450 |
| Research Assistant 30 % FTE | \$0 | | \$10,658 | \$10,658 |
| <i>Total Salaries and Wages</i> | <i>\$59,547</i> | <i>\$19,673</i> | <i>\$46,108</i> | <i>\$125,328</i> |
| <i>Fringe Benefits 28.0%</i> | <i>\$16,673</i> | <i>\$5,508</i> | <i>\$12,910</i> | <i>\$35,091</i> |
| Other Personnel | | | | |
| Community Leader Stipends (30) | \$7,500 | | | \$7,500 |
| Sub Total Personnel | \$83,720 | \$25,181 | \$59,018 | \$167,919 |
| OTHER DIRECT COSTS | | | | |
| Project-Related Telephone | | \$960 | | \$960 |
| Project Related Supplies | \$2,682 | \$2,682 | | \$5,364 |
| Project Related Printing | | \$507 | \$507 | \$1,014 |
| Project-Related Postage | \$1,760 | | | \$1,760 |
| Equipment Rental/Purchase | \$1,250 | | \$2,500 | \$3,750 |
| Travel | | | \$2,742 | \$2,742 |
| Meetings/Conferences | \$3,740 | | \$450 | \$4,190 |
| Consultants and Contracted Services | \$2,500 | | | \$2,500 |
| Other Costs | | \$2,136 | \$0 | \$2,136 |
| Subtotal Other Direct | \$11,932 | \$6,285 | \$6,199 | \$24,416 |
| TOTAL DIRECT COSTS | \$95,652 | \$31,466 | \$65,217 | \$192,335 |
| INDIRECT COSTS 15% | \$14,348 | \$4,720 | \$9,783 | \$28,851 |
| SUBCONTRACTS OR REGRANTS (Itemize in budget narrative) | \$10,000 | | | \$10,000 |
| TOTAL PROJECT COSTS | \$120,000 | \$36,186 | \$75,000 | \$231,186 |

Proposal Budget Templates and Guidance

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|---|---|
| <p>Carnegie Corporation of New York Key Template Documents http://carnegie.org/grants/grantees/key-template-documents/</p> | <p>Carnegie’s Excel® budget template has been widely shared and many funder templates are similar. Carnegie site also provides useful templates for Letter of Endorsement, Financial Report, and Executive Summary.</p> |
| <p>Associated Grantmakers Common Proposal Format http://www.agmconnect.org/cpf/</p> | <p>Excel® template compares project to operating costs. The template may be too detailed for many funders, but is a good starting point for an internal budget template.</p> |
| <p>Minnesota Council on Foundations Common Proposal Format http://www.mcf.org/nonprofits/minnesota-common-grant-application-form</p> | <p>Word® document includes a simple budget template which has been adopted by several funder groups with common proposal format initiatives.</p> |
| <p>Just Grants – Arizona Master Budget Planning Checklist & Worksheet http://www.azgrants.com/, click on Planning Worksheets under Tips, Tools & Info</p> | <p>Word® template is an easy-to-use tool for budget beginners.</p> |
| <p>Bill & Melinda Gates Foundation http://www.gatesfoundation.org/Pages/Search.aspx?term=budget%20narrative</p> | <p>Gates provides several Excel® budget templates and budget narrative guidance documents for potential grantees. Some have good general application; others may be too specific to Gates.</p> |
| <p>Five Year Budget Calculator, University of Texas at Austin http://www.utexas.edu/research/osp/resources/forms.html</p> | <p>Excel® template is a good example of a university-based project internal worksheet.</p> |