

## Budget Narrative Guidelines

The budget narrative must accompany all proposals and grant reporting. **Please provide this in a word document, listing the name of your organization, project title and current grant number in the header.** Below is a sample budget narrative. Listed within each category is a description of the information that the Foundation requires to review your proposed budget or grant report. Organize the narrative in accordance with sections on the sample line item budget.

### Sample Narrative

#### Salary Expenses

*In addition to the information required on the line item budget form, include detailed information, for example:*

The Clinical Coordinator is a full-time employee (1 FTE) who will be spending 50% of her time providing operational case management and referrals.

#### Employee Benefits

*Indicate what benefits will be provided and identify the fringe benefit rate for your agency. (Please note the Foundation will only award a maximum 25% of salaries for benefit expenses) If different rates were used for different individuals (full-time, part-time) your narrative should contain a table that summarizes the calculation for each individual as follows:*

Sample Table	Salary	Fringe Rate	Total
Program Director	\$40,000	.25	\$10,000
Clinical Director	\$10,000	.10	\$ 1,000
Total			\$11,000

#### Direct Project Expenses

*The projected expenditures for each line-item should be listed separately along with a description of how estimates for each were determined. For example:*

➤ **Office Supplies**

*The requested office supply budget is \$900 in year one. This includes \$500 for supplies such as stationary, copy paper, pens, pencils, and business cards. Additionally, \$400 is budgeted for computer supplies to support the component of our project that involves data analysis.*

➤ **Staff Training and Education**

*Training/Education should be explicitly related to your proposal. An example of this would be the registration cost to attend a conference in the Commonwealth or Washington D.C. area. This training would strengthen staff skills or knowledge in the specific subject area that is the focus of the proposal.*

We are requesting funds for one conference offered by the National Institutes of Health on mental health issues for the Clinical Coordinator and Social Worker. *(Identify the specific*

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*meetings and conferences you will attend.)* The budgeted cost for the conference is projected to be \$750 a person, for a total of \$1500. The costs include conference registration fees and lodging (travel to and from the conference would appear under “Travel”).

### ➤ **Marketing/Communications**

*Funds can be allocated to increase awareness and visibility and promote and disseminate information about the program. Costs associated with the printing of brochures, newsletters, press kit, etc. should be listed along with a description.*

A newsletter will be printed containing articles on mental health issues. The total cost for designing and printing a monthly newsletter for one year at 200 copies per month is \$3,500.

### ➤ **Travel**

*The projected expenditures for project staff travel should be outlined. This can include mileage reimbursement for travel to/from patient’s homes and/or travel to/from conferences and seminars. The basis for the calculations as well as the purpose for the travel should be provided. Travel estimates for mileage should be based on your institution’s current reimbursement policies.*

Round trip travel by car to the National Institutes of Health sponsored mental health symposium in Washington, D.C. will be \$150. The remainder of the travel budget will be mileage reimbursement for the Social Worker’s home mental health counseling visits.

### ➤ **Indirect Costs**

*Indirect costs are limited to **10%** of your project’s total operating expenses.*

## **Consultant / Contractual Agreements**

*Consultants: If consultants will be requested, then you should outline the need for each including the tasks to be accomplished and fees to be paid.*

*Contractual Agreements: For each proposed contract, you should provide an explanatory paragraph that describes the services to be provided, the contractor, dates of contract, dollar amounts and tasks/deliverables.*

## **Equipment**

*Itemize the equipment requested and indicate how the equipment will help you manage and advance the program. Please follow your institution’s equipment capitalization threshold policy to determine whether an item is classified under equipment or minor equipment expense.*

## **Capital Project Costs**

*Building, construction or capital improvement projects will be considered only if the project can demonstrate it would improve health and access to healthcare for the medically indigent in the Foundation’s service area.*