BUDGETS

TIMELINES

1

Determine the

Budget

2

Developing the budget is a crucial part of the proposal writing process. If you are unsure where to start, start with the budget of what you need to complete your project. Design a budget that is realistic, covers all objectives, and follows the project timeline.

Use your money to fund materials and services that not normally included in a school budget.

Budgets are not estimates.

3

Design a budget that is realistic, reasonable, is allowed by the guidelines of the grant, and necessary for project success. The amount of funding requested should be commensurate with the effort necessary to accomplish the project goals.

Read the budget guidelines carefully, and follow them exactly.Items included MUST be begun or completed during the grant period only. No services contracted, or items ordered previous to the grant award can be funded from the grant.

If you find it necessary to change the budget during the grant period, you must have written permission from the funder.

FIRST INVESTIGATE:

- Assets assessment
- Matching funds and cost-sharing
  - **Inkind**
  - **Actual cash**
  - **Computing values**

    (Cost based on those served)

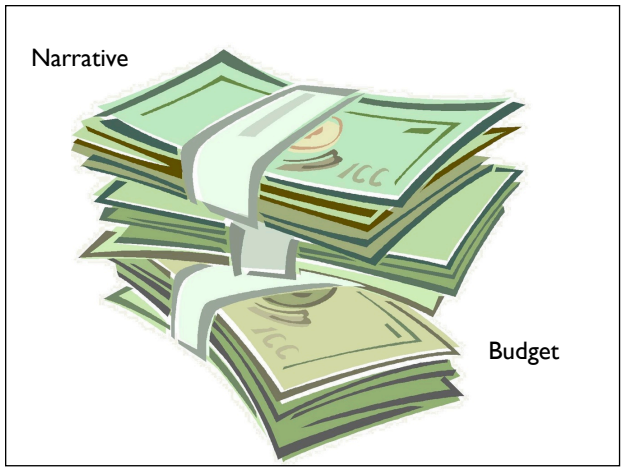
4

5

You cannot supplant school budgets. Supplanting is using district money to "replace" or take the "place of" existing local funding. The budget must reflect purchases and services not normally covered by the school district. Supplementing is enhancing existing programs or services with more or new programs or services.

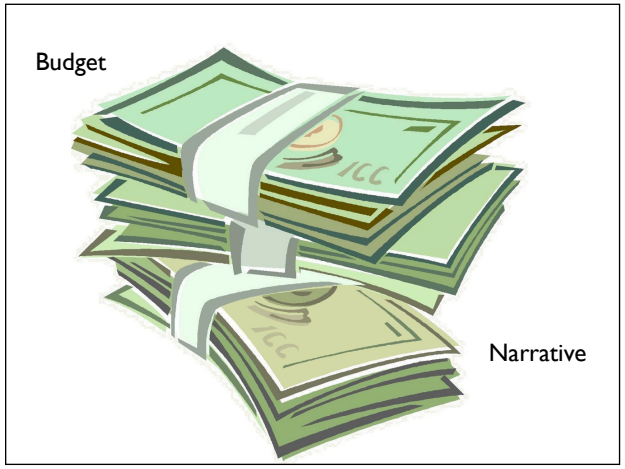
6

Explain costly, big items in great detail. Focus on a change in curriculum and instruction/student needs, and take the focus off the big items. Bigger, more expensive items often make a budget look top-heavy. Keep travel costs fairly low. Most foundations do not like to pay for personnel to fly around the country, unless it is necessary for program implementation. For example, a national training only offered in another state.



7

Make sure everything that is in the proposal narrative is reflected in the budget, and anything in the budget is reflected in the proposal narrative. They must tell the same story. Indicate how cost estimates were made for all budget line items, why the expense is required for the proposed project, and reflects the described activities. For example, if you put a digital camera in the budget, you must have goals/activities that indicate the need for use of the camera. Make sure everything matches your timeline.



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Is this cost effective?

- **Method or Activity**
- **Estimated Cost**
- **Numbers Served**
- **Cost per Client**
- **Advantages and Disadvantages of the Method**

9

Grant funds can only be used for the population identified in your proposal. Once the award is granted, you must obtain written permission from the funder to change the population.

Travel and Conference

If travel is included, provide specific information on the dates, purpose, destination, number of travelers, all related costs (such as conference fees, airfare, mileage, parking, tolls, public transportation, meals, and lodging). Estimates must be as accurate as possible, so utilize online sources to get transportation and lodging costs. If needed, use the federal per diem tables: http://www.gsa.gov/portal/category/21287

10

Vendor

Source

When ordering items, be sure to list the vendor and source of prices.

11

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Vendor

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12

If needed, identify in-kind/match funds.

Match funds could be District contributions for personnel, computers, conference registration, etc. or funds from foundations, donations, etc. that would be utilized in the grant. Volunteer time contributed to the project can also be included. For the current value of that time, use the hourly rate listed on: http:www.independentsector.org/volunteer_time/

13

Double/triple check your calculations.

14

Be sure to include...

- Personnel needs, including stipends, curriculum hourly rate, and consultant fees
- Salary and benefits (business department should be able to provide)
- Conference expenses, including travel, meals, hotel, and conference registration

15

Did you request adequate funding?

16

Do you have the right tools to do the job?

17

Before you start, you need...

- Itemized list of purchases with vendors needed for the project, such as: instructional supplies, office supplies, hardware, software.
- Field trip expenses, such as, transportation, and entrance or ticket fees.

18

A “need” is considered a discrepancy between the way something is, and how it should be, such as low reading scores for students who are capable of achieving academic success but do not have the resources or support to be successful. A “want” is a lack of something, such as: computers, iPads, etc. Funders generally “needs” and not “wants”. They do not fund “stuff” but fund projects.

19

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21

Questions to ask...

22

- Did I relate major equipment purchases to specific objectives?
- Is the budget adequate enough to meet the goals of the project?

23

Is everything in the narrative noted in the budget, and vice versa?

24

- Did I clearly explain how multiple items, such as 30 calculators, will be shared among several teachers or several classes? This kind of explanation makes it look like the money is going farther.

25

- Is the budget focused on program goals? For example, if your grant is for English, don't include microscopes, unless you have clearly stated objectives that indicate curriculum integration.

26

Sustainability

27

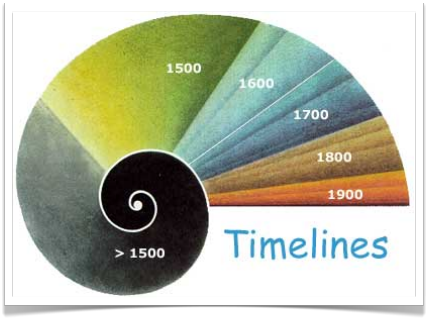
How will project be supported after termination of grant?
Consider various possibilities:
Fee for service
Other funders
Greater internal support for project
Other earned income ventures

Congratulations!

28

Now that your budget is complete, remember to:

- Put your budget on an Excel spreadsheet
- Have the Resource Development review the budget
- Obtain approval from your supervisor, business office for insurance concerns, administration if you are including a match in any form



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Most grant applications will ask for timelines for your project.

Organize your activities

30

- Put in chronological order
- Assign dates - beginning and ending or ongoing
- Indicate person responsible
- Include volunteer engagement/recognition/press

For example, begin with hiring/staff selecting/ordering
Make sure all activities are listed

Timeline Sample

GRANT -

Central Office Contact: **Primary Implementer(s):**

Key Partner(s):

Activity	Description	Person Responsible	Beginning Date	Ending Date
Post Job Positions	After school teacher	M. Smith, HR	Month 1	Month 2
Invite Advisory Board	Six Members/List from Superintendent	R. Block, Supt. Asst.	September 2014	October 2014
Order Program Supplies	After school teaching supplies	TBD Afterschool Teacher		