

Foundations of East Chicago  
**Grant Application Budget Form**

**Example**

April 27 2011



# APPLICANT INSTRUCTIONS

## WELCOME

Foundations of East Chicago, Inc.

This is a new budget development process for Foundations of East Chicago (FEC) applications. Familiarize yourself with this file. There are five TABs at the bottom of this window, "Instructions", "Worksheet 1", "Worksheet 2", "Budget" and "Collaboration". This is the "Instructions" TAB. You may find it beneficial to PRINT THIS PAGE for reference. If you have any questions, please call our office at 219-392-4225. Thanks.

Each TAB has different functions. Colored cells have been created to help you navigate around the file and fill in information.

Instructions	You are reading these instructions on this TAB.
Worksheet 1	This TAB's function is for generating hourly rates and unit costs for the Budget and to use to create target costs which will be compared to proposed costs later.
Worksheet 2	This TAB will be used to delegate personnel hours and unit costs against various Tasks identified as part of the proposal.
Budget	This TAB collects data from the other worksheets and provides areas to identify task descriptions and importance to the overall proposal. Additional information regarding non-FEC support will be shown on this TAB to provide a total picture regarding the proposal.
Collaboration	This TAB will be used to collect data from multiple agencies working collaboratively to reach a common goal as part of a Collaboration Proposal.

**General Note:** There are several areas where Grantees will enter information and costs. Generally, the Grey areas provide explanation and White areas pick up data/entries from other TABs. Formulas exist in many cells. These may not be frozen or protected. Please be aware of your work. In addition, Rows and Columns may be hidden, be aware that if more elements are needed, un-hiding Rows and Columns may be done, otherwise, contact FEC if additional space is needed. If you have questions, call FEC.

## SET UP Upon receipt of this file from FEC

### 1 Go to Worksheet 1 - "Staff Assignment Cost Table"

- a Go to cell C2 and enter your organization's name. Below (cell C3), enter the Program Title.
- b Go to B9, enter names of staff, consultants, materials and other elements which will have hourly or unit costs in this cell and other cells below. The row above illustrates how related costs are calculated as part of the development of proposal.
- c Go to C9, enter annual salary cost data for each staff/consultant. Refer to notes below for guidance. If staff or consultant costs are not related to annual salary values, ignore entering values here and move to column G to enter rates for hourly or unit costs, including stipend costs relating to specific activity unit costs.
- d When costs are calculated based on annual salary values in Column C verify the hours by year, the calculation is based on 2080 hours per year, the standard 40 hours a week for 52 weeks.
- e Similarly, if calculations are to be made, verify your fringe costs. These costs are the total match and other costs employers make for employers as a factor of the salary costs. The example reflects a standard cost for full-time, minimum-wage earners at approximately \$3,770 per year for taxes, insurance, etc. That cost is 0.25 or 25% of the salary (\$3,770/\$15,080). Based on this calculation, enter the fringe cost of 0.25 in Cell E6.
- f Moving along, the "Other" Column, F, can be used to round out the calculations so a value used for estimating can carry a value which can be more easily checked as estimating work continues.
- g The "RATE" Column, adds the values of Columns D, E, and F. If the person doesn't want to show the calculations, entering an hourly/unit value in Column G may be acceptable, however, organizational staff reviewing the worksheet won't be able to verify any costs if the calculation process is skipped and replaced with entered values (FEC need not know calculation details, so values may replace calculations prior to submittal to FEC).
- h In Column H, Target hours and or unit quantities may be placed for each line reflecting the hours a staff will dedicate to a proposal or the quantity of supplies or consumables that may be anticipated. The Target is shown in Column I.
- i Columns K and L will pick up calculations from other sections of the file to stand beside original estimates. This could be helpful in cost-cutting strategies or to demonstrate that original estimates were low after "scoping" out the proposal through the completion of the document.
- j Related Line-number values will be shown on the Budget TAB.

### 2 Go to Worksheet 2 - "Task Cost Calculation Table"

- a Note that "Staff" names from Worksheet 1 are shown in Row 6, beginning in Cell C6 and continuing to the right. The Hourly Rate/Units are shown in Row 7.
- b Task identification begins in Cell B8 and continues downward. Generally, Tasks are entered in order of their sequence in the overall proposal. When representing non-human costs, reflect all related costs in categories, such as Materials, Consumables, mileage, etc. Such costs can be grouped for ease of assignment and explained later in the document so FEC can assess the proposal.
- c Note that Task entries (names & titles) are placed on every other line within pale yellow cells.
- d Below each Task entry, hours and units are placed below every "Staff", etc. which will participate in the Task. The total number of hours for each Staff are shown above in Row 5. The cost calculation for each "Staff" is shown in Row 4. These values are shown on Worksheet 1, Columns K and L. Comparison rows 2 & 3 reflect values from Worksheet1 Columns H & I.
- e Total costs for each Task are shown to the right in Column Y. Column Z automatically copies the Task entries from the left.
- f Task Names and Costs are reflected on the Budget TAB and aligned with Line Numbers.

- 3 **Go to "Budget" TAB**
- a Go to cell F4 and enter the amount you are requesting for this grant.
  - b Go to cell B7, note that the name of the Task adjacent to Line 1 is shown there with the budgeted cost shown to the right.
  - c Within the "IMPORTANCE & DESCRIPTION" column, enter reasons WHY the Task is important to the overall proposal.
  - d Below each Task, enter a description of the Task, mentioning the components and potential outcomes when important.
  - e Go to the "Staff and Expense" section. In Cell B55 note the staff entry from Worksheet 1. To the right enter the title of the staff and further right, enter their qualifications and expertise.
  - f Go to the "FEC TOTAL BUDGET" section. In Cell D78 note the total cost shown in Lines 1 through 46. Below that is a "Note" stating either a WARNING about the total being different than the Requested dollars in Cell F4, or the fact that the values agree. To agree, enter the Requested dollars in Cell F4 to equal the Total in Cell D78.
  - g Go to the "Additional Information" section. In Cell D 82, enter the value of "In-Kind" contributions with a description to the right.
  - h In Cell D 83, enter the value of "Other Sources" contributing to the proposal with a description to the right.
  - i In Cell D 84, the combined value of Cells D78, D82 and D83 is shown automatically.
  - j Notes may be added as necessary or desired below.
  - k Complete the sheet by entering a date in Cell H4 using the MM/DD/YYYY format.

4 **When applicable: Go to the "Collaboration" TAB**

- a Every Collaborative Member will complete their own budget file and email it to the Lead Agency.
- b The Lead Agency will assemble Collaborative Members data, recognizing that some cost elements may be aligned with another Member's proposal or additional line may be created to show costs which are "unique" to other Member proposals. FEC is available to assist in this process if necessary.
- c The Lead Agency will also collect application write-ups and coordinate sections of the application.
- d Once collected, the Lead Agency will package the Application and Budget into an email and send to FEC. Copies may also be circulated to Collaboration Members.
- e FEC will review the email attachments and work with the Lead Agency to address inconsistencies and weaknesses in the proposal prior to calling a meeting with all Collaboration Members to discuss the proposal and budget. A decision will be made to refer the proposal to final application at that point.
- f **If there are questions, please call FEC at 219-392-4225.**

Organization Name:  
 Proposal Title:

Enter Name Here  
 Enter Title Here

**Staff Assignment  
 Cost Table**

<i>Hrs per Yr</i>	<i>Overhead factor</i>
<b>2080</b>	<b>0.25</b>

Foundations of East Chicago, Inc.

Line #	PERSONNEL, Subcontractors and Expense Items (will appear in other worksheets)	ENTER Annual Salary	(1) Hourly Salary	(2) Overhead	(3) Other	(4) RATE Hourly/Units (7)	(5) TARGET Hours/Units (Quant.)	(6) Target	From Worksheet 2		
									HRS	COST	
	Sample Staff Example	\$ 15,080.00	7.25	1.81	0.07	9.13	369.00	3,368.97			
S 1	Enter Names Here	\$ 16,640.00	8.00	2.00	1.00	11.00	50.00	550.00	50.00	\$ 550.00	
S 2	Person B	\$ 30,000.00	14.42	3.61	1.97	20.00	215.00	4,300.00	215.00	\$ 4,300.00	
S 3	Teachers (cost per class)					50.00	30.00	1,500.00	30.00	\$ 1,500.00	
S 4	Drivers					30.00	2.00	60.00	2.00	\$ 60.00	
S 5	T Shirts					6.00	50.00	300.00	50.00	\$ 300.00	
S 6	Snacks					2.00	150.00	300.00	150.00	\$ 300.00	
S 7	Fuel					5.00	20.00	100.00	20.00	\$ 100.00	
S 8	-								0.00	\$ -	
S 9	-								0.00	\$ -	
S22	<b>Unhide rows above this line if needed.</b>										
S23	<b>TOTALS</b>							<b>517.00</b>	<b>7,110.00</b>	<b>517.00</b>	<b>7,110.00</b>

**NOTES Instructions to complete the "Staff Assignment Cost Table."**

- (1) Take an annual salary and divide it by 2080 hours for a full time employee.
- (1) Take a Part-Time employee hourly rate and multiply it by 2080 to equal a Full-Time Employee salary.
- (2) Overhead values include: matching taxes, insurance, FICA, etc.
- (3) Use entries in the "Other" Column to include values which may round up values to the nearest dollar.
- (4) Hourly cost for personnel, unit costs for contractors and expense items.
- (5) Estimated hours/units needed to accomplish tasks. Used as target to double check task costs.
- (6) Result of multiplying Target Hours (Quantity) and Hourly (Unit) value.
- (7) Values may be placed under "Hourly (Unit)" heading in lieu of completing the calculation table.

**Task Cost Calculation Table**

Enter Name Here	Enter Title Here
-----------------	------------------

Foundations of East Chicago, Inc.

Staff Cost from Workseet 1	\$ 550	\$ 4,300	\$ 1,500	\$ 60	\$ 300	\$ 300	\$ 100				
Staff Hours from Worksheet 1	50	215	30	2	50	150	20	0	0		
<b>Total Dollars per Staff</b>	<b>\$ 550</b>	<b>\$ 4,300</b>	<b>\$ 1,500</b>	<b>\$ 60</b>	<b>\$ 300</b>	<b>\$ 300</b>	<b>\$ 100</b>	<b>\$ -</b>	<b>\$ -</b>		
<b>Total Hours per Staff</b>	50	215	30	2	50	150	20	0	0		

Line #	TASKS (will appear in other worksheets)	Enter Names Here	Person B	Teachers (cost per class)	Drivers	T Shirts	Snacks	Fuel	-	-	Unhide columns to the left of this column if needed.	TOTAL Dollars over Hours per Task
1	Task 1 [Enter Tasks]											\$ - Task 1 [Enter Tasks]
2	Hours (Units)											0.0 Hours
3	Intake	528										\$ 528 Intake
4	Hours (Units)	48										48.0 Hours
5	Courses/Studies		1,300	1,500								\$ 2,800 Courses/Studies
6	Hours (Units)		65	30								95.0 Hours
7	Field Trip	22			60							\$ 82 Field Trip
8	Hours (Units)	2			2							4.0 Hours
9	Evaluation/Graduation		3,000									\$ 3,000 Evaluation/Graduation
10	Hours (Units)		150									150.0 Hours
11	Materials/Consumables					300	300	100				\$ 700 Materials/Consumables
12	Hours (Units)					50	150	20				220.0 Hours
13	Task 7											\$ - Task 7
14	Hours (Units)											0.0 Hours
15	Task 8											\$ - Task 8
16	Hours (Units)											0.0 Hours
17	Task 9											\$ - Task 9
18	Hours (Units)											0.0 Hours
19	Task 10											\$ - Task 10
20	Hours (Units)											0.0 Hours
21	Task 11											\$ - Task 11
22	Hours (Units)											0.0 Hours
23	Task 12											\$ - Task 12
24	Hours (Units)											0.0 Hours
46	Unhide rows above this line if needed.											

ORGANIZATION NAME	** FEC Only ** APPLICATION NUMBER	PROGRAM TITLE:	** Enter ** "Requested \$"	**Enter** Application Date
Org. Name from Worksheet		Title from Worksheet	\$ 7,110	4/27/2011

Line #	"ACTIVITY" (List all Task items pertinent to Application)	APPLICATION BUDGET VALUES by TASK	IMPORTANCE & DESCRIPTION: (Demonstrate WHY Tasks are important and describe the work, WHO will do it & HOW it supports the application.)
1	Tasks from 'Estimates' Tab"	\$ -	Why is Task important to Program's success?
2	Description (of above Task):		
3	Intake	\$ 528	This is the beginning point to measure student data, including address, grade, etc. plus test for base understanding levels.
4	Gather data on students, pre-testing		
5	Courses/Studies	\$ 2,800	Basic education is augmented with research skill development and local history/events to engage students in understanding how education can open their eyes in the world they live in.
6	Five courses will be taught, reading comprehension, basic math, algebra 1, local history, and library/research skills		
7	Field Trip	\$ 82	Students will be able to better understand they can reach college and why it is important.
8	Trip to IUN and PUC to see college and monitor one class arranged by teachers with local professor input.		
9	Evaluation/Graduation	\$ 3,000	Ceremony with parents to share the learning experience and inform parents about helping their students.
10	Reception with family and honoring every student with examples of what they learned and why it is important to keep learning.		
11	Materials/Consumables	\$ 700	Snacks for classes
12	Fuel the body powers the mind.		
13	Task 7	\$ -	Task Importance.
14	Task Description:		
15	Task 8	\$ -	Task Importance.
16	Task Description:		
17	Task 9	\$ -	Task Importance.
18	Task Description:		
19	Task 10	\$ -	Task Importance.
20	Task Description:		
21	Task 11	\$ -	Task Importance.
22	Task Description:		
23	Task 12	\$ -	Task Importance.
24	Task Description:		
46	Unhide rows above this line if needed.		

**Staff and Expenses**

	Staffing, Contractors, etc.	(Provide position)	Staff Qualifications & Expertise:
S 1	Staffing from 'Estimates' Tab	Secretary	10 years experience
S 2	Person B	Program Manager	Previous experience in operating similar programs
S 3	Teachers (cost per class)	Teachers & assistants	Certified teachers and teacher aids which receive teacher approval
S 4	Drivers	Driver	Licensed bus driver
S 5	T Shirts		
S 6	Snacks		
S 7	Fuel		
S 8			
S 9			
S21	Unhide rows above this line if needed.		

**FEC TOTAL BUDGET**

B 1	TOTAL APPLICATION BUDGET:	\$ 7,110
*TOTAL APPLICATION BUDGET* agrees with 'Requested \$.'		

**Additional Information**

	ADDITIONAL INFORMATION	Value	Description
B 2	In-Kind:	\$ 2,700	(Provide a cost-equivalent breakdown which when combined is totaled to the left.
B 3	Other Sources:	\$ 15,000	Provide a list of funders, potential funders and percent estimates regarding the potential to capture those funders' contribution to the program.
B 4	Overall Proposed Budget:	\$ 24,810	The combined total of the "Total Application Budget", "In-Kind" contributions and "Other Sources" funds.
-N 1	Note 1:		
N 2	Note 2:		
N 3	Note 3:		

Title from Worksheet

**COLLABORATION APPLICATION BUDGET BEAKDOWN FORM EXAMPLE**

Breakdown Sheet

Line #	Org. Name from Worksheet	Place Other Agency Names	Agency Name	Agency Name	Agency Name	Agency Name	Agency Name	COMBINED TOTAL
	LEAD							
	"ACTIVITY" (As listed on Summary Sheet)	APPLICATION BUDGET VALUES	APPLICATION BUDGET VALUES	APPLICATION BUDGET VALUES	APPLICATION BUDGET VALUES	APPLICATION BUDGET VALUES	APPLICATION BUDGET VALUES	COMBINED TOTAL
1	Tasks from 'Estimates' Tab"	0.00						0.00
2	How will Collaborators/Partners participate?							
3	Intake	528.00						528.00
4	How will Collaborators/Partners participate?							
5	Courses/Studies	2,800.00	5,000.00					7,800.00
6	How will Collaborators/Partners participate?							
7	Field Trip	82.00		200.00				282.00
8	How will Collaborators/Partners participate?							
9	Evaluation/Graduation	3,000.00			1,000.00			4,000.00
10	How will Collaborators/Partners participate?							
11	Materials/Consumables	700.00						700.00
12	How will Collaborators/Partners participate?							
13	Task 7	0.00						0.00
14	How will Collaborators/Partners participate?							
15	Task 8	0.00						0.00
16	How will Collaborators/Partners participate?							
17	Task 9	0.00						0.00
18	How will Collaborators/Partners participate?							
19	Task 10	0.00						0.00
20	How will Collaborators/Partners participate?							
21	Task 11	0.00						0.00
22	How will Collaborators/Partners participate?							
23	Task 12	0.00						0.00
24	How will Collaborators/Partners participate?							
46	<b>Unhide rows above this line if needed.</b>							
47	List all Tasks and participation explanations in the columns above. Cost data aligning with Collaboration Members will show who is participating. Refer to individual Budget sheets for explanation of Importance and Description.							

**Staff and Expenses**

Staffing, Contractors, etc.	Agency Assignment	Agency Assignment	Agency Assignment	Agency Assignment	Agency Assignment	Agency Assignment
S 1 Staffing from 'Estimates' Tab	Secretary					
S 2 Person B	Program Manager					
S 3 Teachers (cost per class)	Teachers & assistants	X				
S 4 Drivers	Driver					
S 5 T Shirts	0.00					
S 6 Snacks	0.00					
S 7 Fuel	0.00					
S 8 -	0.00					
S 9 -	0.00					
S21	<b>Unhide rows above this line if needed.</b>					
Place a symbol (X) in columns where staff will be used.						
The above section is setup to show information from the Budget sheet from this file. Staff/costs from other Collaboration Members can be placed above to overwrite the formulas which copy information.						

**FEC TOTAL BUDGET**

B 1	TOTAL INDIVIDUAL BUDGET	\$ 7,110	\$ 5,000	\$ 200	\$ 1,000	\$ -	\$ -	\$ -
CB1	COMBINED BUDGET	\$ 13,310						

**Additional Information**

B 2	In-Kind:	\$ 2,700	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
B 3	Other Sources:	\$ 15,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
B 4	Overall Proposed Budget:	\$ 24,810	\$ 5,000	\$ 200	\$ 1,000	\$ -	\$ -	\$ -
CB2	COMBINED BUDGET	\$ 31,010						
N 1	Note 1:							
N 2	Note 2:							
N 3	Note 3:							