

US PROGRAM PROJECT SUPPORT BUDGET NARRATIVE SAMPLE

BILL & MELINDA
GATES foundation

This document is a sample of the “Project Budget” section of the US Program Project Support Proposal Guidelines. This sample can be used as a reference tool in the development of your organization’s grant budget narrative. Through this document we have attempted to provide an illustration of the level of detail regarding costs and cost assumptions we would like to see, but are in no way providing guidelines for the appropriateness of the costs included in this sample. If you have any questions during the development of your proposal or budget please do not hesitate to reach out to your program officer at the foundation.

Project Budget

Sample Organization (SO) has created a budget that drives towards the execution of all milestones and ultimately achieves the desired outcomes of this project within the proposed timeframe. SO’s budget in the first period of this proposal places focus on research and development of the classroom tools that will be piloted in period two. Primary costs include SO staff time to support both project management and research. In addition, the budget supports engagement of a subject matter expert and a graphic designer to ensure the products that are developed are the highest quality possible. SO has budgeted for design and printing costs in period one of this project to ensure that we adhere to the timeline we have laid out in this proposal.

SO’s budget in the second period of this grant focuses on two key pieces of the project. First, the budget supports subgrants to three school districts that will pilot the tools created in period one. While the majority of the costs in period two are related to subgrants, SO continues to engage key staff members in significant ways to ensure solid project management and subgrantee support. The second primary task budgeted for in period two is the engagement of pilot districts in a meeting to share their experiences and learning with one another. To accomplish this task, the budget includes costs to convene leaders from each participating district.

SO is confident in our ability to carry out the work as outlined in this proposal. However, there are a few factors that might impact our ability to operate within the proposed budget. The first primary risk is the selection of the pilot districts. The location and size of the district may vary greatly and budget numbers have been estimated based on 500 participating students per district. Once pilot districts have been identified SO will work with district leadership to confirm the number of participating students. If this number varies greatly from the estimate, SO will work closely with the funders of this project to ensure we are still able to meet the desired outcomes. An additional issue that may arise is the need for ongoing support of subject matter expert consulting in period two. If this is the case we hope to receive sporadic support from this consultant pro-bono as we envision our requests for time to be very limited.

SO is requesting a two-year grant in the amount of \$333,467 from the Bill & Melinda Gates Foundation to fund the Sample Project outlined in this proposal. The total cost of carrying out the Sample Project is \$666,933. SO has already secured a \$300,000 in additional grant funding from the Local Family Foundation (\$100,000 over two years) and the Private Corporate Foundation (\$200,000 over two years). This commitment has insured the successful start-up of

the project. In addition, SO plans to raise the remaining \$34,000 by no later than the middle of the first budget period (December 2011). We strongly believe we will be able to raise all additional funds through our strong base of private donors.

Below please find detailed explanations for key budget line items:

Personnel (Total \$272,792, Gates Request \$136,396): SO will utilize four key staff members during the two year project. Those staff members include the following:

Susan Smith, Project Manager: Susan's responsibilities as Project Manager include general oversight of the project team, ensuring work plans are clearly articulated and timelines adhered to, and working with funders and subgrantees to ensure clear and timely communication. She will serve as the primary contact for all funders as well as the three pilot school districts selected in year two of the project. Susan will be spending 80% of her FTE time on this project in both period one and period two. The total cost for Susan's time is \$147,056. SO is requesting funding from the Gates Foundation to cover 50% of that cost (\$73,528).

Bill Thompson, Research Analyst: Bill will support the team by conducting research on all key components of this project. Bill will spend 50% of his FTE time on this project in period one to ensure all research needs are met and milestones are achieved. In period two Bill's time will be significantly reduced to 10% FTE time and will provide as needed support to the team as questions arise. The total cost for Bill's time is \$46,956. SO is requesting funding from the Gates Foundation to cover 50% of that cost (\$23,478).

Shelby White, Project Coordinator: Shelby will support Susan with coordination of the proposed project. Her primary responsibilities will include logistics, communication management, and meeting planning. Shelby will spend 50% of her FTE time on this project in both period one and period two. The total cost for Shelby's time is \$65,650. SO is requesting funding from the Gates Foundation to cover 50% of that cost (\$32,825).

Miguel Espinoza, Executive Director: Miguel will be responsible for the overall strategic vision of the project. His primary project responsibilities include high level decision making and guidance on strategic direction. Miguel will spend 5% of his FTE time on this project in both period one and period two. The total cost for Miguel's time is \$13,130. SO is requesting funding from the Gates Foundation to cover 50% of that cost (\$6,565).

Consulting and Professional Fees (Total \$69,600, Gates Request \$34,800): In period one of the project SO will engage an independent consultant to provide subject matter expertise. This consultant will work closely with the Project Manager and Research Analyst to ensure the outputs developed in year one are of the highest quality and reflect the latest research. We have budgeted to engage this consultant 5 days a month for 12 months at a cost of \$1,000 per day. We are requesting \$30,000 from the Gates Foundation which covers 50% of the total cost.

In addition, we plan to engage a web developer in the final four months of period one. This company will work with our final products to ensure they are designed for student and teacher consumption and ready for printing and publication in the final month of period one. We have budgeted to engage the graphic design firm 8 hours a week for 16 weeks at a rate of \$75 per

hour. We are requesting \$4,800 from the Gates Foundation to cover 50% of the total cost.

Materials and Supplies (Total \$300, Gates Request \$150): At the start of period two SO will mail copies of the final product to the three selected pilot school districts. We have budgeted for shipping costs of \$100 per school district. Again we are requesting 50% of the total cost from the Gates Foundation.

Printing and Publications (Total \$37,500, Gates Request \$18,750): At the end of period two SO will work with the selected graphic design partner to print final materials for each participating school district. We are estimating 500 student participants per school district. At a printing cost of \$25 per student total costs are \$37,500. We are requesting 50% of this total from the Gates Foundation.

Travel and Accommodations (Total \$24,750, Gates Request \$12,375): In period one, the Project Manager and Project Coordinator will attend one Gates sponsored meeting. In period two one additional Gates sponsored meeting has been budgeted. In addition, SO has budgeted for the Project Manager to travel to each of the three pilot school districts twice. Each trip has been budgeted at \$1,225 per person assuming a trip of two nights (hotel \$250 per night, airfare \$500, meals \$75 per day). In period two additional travel costs include \$500 airfare for 25 attendees at the meeting of all participating districts. Additional meeting costs are outlined below. We are requesting 50% of the total travel costs from the Gates Foundation.

Conferences, Conventions, Meetings (Total \$25,000, Gates Request \$12,500): In period two SO will host a meeting of leadership from participating pilot districts (25 total attendees) to share lessons learned and best practices as well as to hear from experts on how to translate the latest research into practice. Associated meeting costs include \$5,000 for facility rentals, \$12,500 for hotel rooms (\$250 per night with 25 attendees staying 2 nights), \$3,750 for hotel catering (covering 1 evening reception, 2 breakfasts, 2 lunches, 1 dinner, and 4 snacks), \$2,500 for a meeting facilitator for two days, and \$1,250 for ground transportation to and from the airport (estimated at \$25 per person each way).

Subgrants (Total \$150,000, Gates Request \$75,000): SO will be subgranting \$50,000 to each participating pilot district in period two. These funds will cover implementation costs including teacher training, costs associated with substitute teachers to cover missed classes during training, and ongoing meetings with participating teachers. In addition, these funds include a stipend in the amount of \$1,000 to five teacher leaders selected in each school district. These teacher leaders will serve as the primary contact for their peers, help communicate the progress of the project and attend the meeting of all districts to share their own experience with others. SO is requesting the Gates Foundation support 50% of the subgrant costs.

Indirect Costs (Total \$86,991, Gates Request \$43,496): SO estimates total indirect costs for this project at 15% of the total project costs. According to the Gates Foundation indirect cost policy for we have requested 15% due to our status as a nonprofit organization. The remaining \$43,496 in indirect costs will be covered by other funding sources.