Budget Request Worksheet Instructions

A separate Budget Worksheet.xlsx must be submitted with each alternative grant request in the below circumstances:

- The *"Unit Budget Request"* tab and/or the *"Non-Unit Budget Request"* tab must be completed for a newly funded program.

- The *"Non-Unit Budget Request"* must be completed for a currently funded Core program if requesting non-unit (traditional grant model) funding for a portion of the remaining award balance.

- No Budget Worksheet should be submitted for requests for existing funded programs *only* proposing minor expansions or modifications to a unit of service for activities outlined in the approved 2020-2022 Core funding contract or included in an existing contract amendment previously granted as part of a new unit request.

If submitting requests for multiple programs, there must be a separate budget worksheet submitted with each applicable request. A budget worksheet is not required in the following circumstances:

- If the request is only for additional units of service for an existing funded program for activities that were outlined in the 2020-2022 Core funding contract. This would not be an alternative grant request and should be submitted as a New Unit Request.

- If the request is only for a transfer of funds between two existing CSF-funded programs, for awarded units for activities that were outlined in the 2020-2022 Core funding contract. This would not be an alternative grant request and should be submitted as a Transfer Request.

Important Note: If when completing the budget worksheets you are copying and pasting amounts from another source, please be sure to use the *Paste Values* function.

STEP 1: START THE *REQUEST SUMMARY* TAB

Enter the requested information in the blue colored cells in the first three tabs on the *"Request Summary"* tab. Only cells that are blue in color may have information entered. Not all blue cells are required to be completed. Please note:

- **Agency Name**: This is a pre-populated list of currently funded Core partners. Select your organization's name from the list.

- **Program Name**: Complete the name of the program for this specific request.

- **Program ID**: Complete the program ID if this is for a currently funded CSF program. If for a new program, leave this field blank.

- **Service Area**: Select the service area for the program.

- **Existing Program/New Program**: Select whether this is for an existing program or a new program. Important note: If selecting *Existing* then the Program ID should be entered.

- All other blue fields on this tab are dependent on information entered in other tabs. It will be revisited in Step 4.

STEP 2: COMPLETE THE *UNIT BUDGET REQUEST* AND/OR THE *NON-UNIT BUDGET REQUEST* TAB(S)

UNIT BUDGET REQUEST

For the *Unit Budget Request* tab, enter information in the units projected column for each calendar quarter from July 1, 2021 through June 30, 2023. Consult the unit of service description guide provided. Units are presented in table in the same order they appear in the guide.

Those cells colored green are units of service in which activities are identical but have different lengths of delivery. If awarded, all units with the same name will be provided in all available units of measurement.

Those cells colored in yellow are units of service added as part of our telehealth expansion. For these units, consult the non-telehealth equivalent to ensure activities and staff qualifications are permitted.

If requesting an extension, be sure to include projected unit quantities in the orange columns. If not requesting an extension, the orange columns should be left blank.

Important Note: If the request is for additional activities not originally proposed in your 2020-2022 Core funding contract for an existing funded program, the amount to transfer and total unit amount to transfer fields will not populate. This is normal. If your request is approved, the additional activities and units will be incorporated into a contract amendment with no net change to awarded total amount but will permit use of the additional units. If the program is new, then the amount is calculated as it is needed to determine the total amount needed to be transferred from other existing funded programs. If submitting multiple requests, those that are approved will be incorporated as a net total change to existing funded activities, units, and award amounts. Additionally, all units of service awarded will also include telehealth equivalents if available.

NON-UNIT BUDGET REQUEST

The "*Non-Unit Budget Request"* tab is to be completed if requesting funding for services and activities not provided under the unit of service model, i.e. not a fit under any units included in the current List of Approved Units of Service, even with minor modifications to the unit description. This could be for either an existing funded program or a newly funded program. Descriptions of the proposed activities in each expense type should be provided in the budget narrative section of SurveyMonkey Apply. You do not need to enter an amount for *every* expense type, only those that are relevant to your program request.

Be sure to complete the information for the requested periods in each column. For CY 2021, amounts entered for projected expenses by type should be for the period beginning July 1, 2021 and ending December 31, 2021. For CY 2022, amounts entered for projected expenses by type should be for the period beginning January 1, 2022 and ending either December 31, 2022 (if requesting extension) or June 30, 2022 (if not requesting an extension). For CY 2023, amounts should only be entered for project expenses by type if requesting an extension.

Below is a brief non-exclusive list of expense descriptions for each of the non-unit expense types.

1. Salary & Benefits

Include the expenses for all the people who will work on the project. _Break out the employee detail in the budget narrative justification._ Don't forget to add payroll taxes (FICA, Medicare, unemployment, and workers' compensation) and fringe benefits such as health insurance. You can include a portion of these costs equal to the portion of the person's time dedicated to the project. **_Full salaries of employees may not be eligible for applicable staff members if billing for units of service and salary & benefit expense for non-units of service. For example, if a staff member only occasionally bills units of service and they are asking for less than full salary and benefits for that individual, it may be permissible and non-duplicative._**

2. Contract Services (consulting, professional, fundraising)
Non-employees that are contracted to do work related to the project. Whenever grant funds are used to pay a third party (individual or organization) outside of the organization, these costs should be included in the grant budget under this category.

3. Occupancy (rent, utilities, maintenance)
Direct project expenses that would not occur if you did not do the project. Some organizations assign a % of these expenses to each project.

4. Training & Professional Development
Costs related to developing staff and preparing the organization to take on this project.

5. Insurance
Costs related to insuring this project that are above and beyond the regular insurance costs for the organization.

6. Travel
Travel related to the project. Could be local or non-local. When budgeting for travel you may want to consider the following: airfare, ground transportation, per diem, lodging, mileage for personal vehicle usage, etc. CSF cannot reimburse for transportation to/from services for CSF clients. CSF may reimburse for travel expenses associated with training or professional development provided it is on an approved activity or related to an approved service.

7. Equipment
Nonexpendable, tangible property. Typically thought of as items that are more costly and durable. When there is a need to rent or buy equipment for use on the project, provide information on the type of equipment to be rented/bought, the purpose or use on the project, the length of time needed, and the rental/purchase rate**.**

8. Supplies
Typically thought of as items that are less costly and get used up. In an office setting a computer would be equipment and the pencil would be supplies.

9. Printing, Copying, & Postage
Photocopying, printing, mailings, postage, and express mail charges that are directly related to the project.

10. Evaluation

Costs related to doing project evaluation. May include hiring external evaluators.

11. Marketing
Costs related to the marketing, advertising, and the promotion of your project. Might include additional website costs that are above typical website costs related to your everyday business.

12. Conferences, Meetings, etc
Costs of holding (or attending) a conference or meeting are included in this category. Some examples are the rental of facilities and equipment for the meeting, honorariums/fees for trainers/guest speakers, travel, and per diem for speakers. Details of costs for each conference or meeting should be broken out and provided in the budget narrative.

13. Administration
Non-personnel expenses you will incur whether or not you do the project. Some organizations include as a % of management staff in this line item. Please note that these expenses will need to be justified if granted and will not be awarded based upon an indirect cost reimbursement model.

14. Other
This expense type is for those expenses not otherwise provided in the other 13 expense types. Pay particular attention to provide explanation in the narrative relating to what activities will be considered this expense type.

When reviewing the application, CSF reserves the right to recommend corrections and adjust expenses into appropriate expense categories. If your request is approved, this will be discussed prior to distribution of your contract amendment. Utilization of non-unit award amounts will be discussed if approved.

STEP 3: COMPLETE REMAINING SECTIONS OF THE *REQUEST SUMMARY* TAB (NEW PROGRAMS)

The total request amount will be populated for the request amounts based on what is entered on the two request tabs.

NEW PROGRAMS
If you are proposing a new program, both the unit budget request and non-unit budget request amounts are totaled in both the Total Request Amount and the Amount to Transfer to New Program from Currently Funded Program(s) fields. These matching figures represent the total amount that would need to be transferred from existing program(s) funding.

Complete the transfer table to designate which existing funded program(s) award amounts you would like to use to accommodate this request. Enter the program name, program ID, and transfer amounts. Transfer amounts should be entered as positive numbers. As amounts are entered, the amount in the transfer amount remaining declines. Once it reaches zero, the task has been completed, the transfer amount has been fully selected, and the cell should turn green.

Important note: If you are not proposing a new program, the transfer section should be left blank.

EXISTING PROGRAMS

If you are proposing changes to an existing program, the total request amount will only include the non-unit budget request total. This amount is needed to determine needed quantity reduction to existing units of service so that the total award amount remains the same. Any additional units of service approved will be awarded with no net change to total award amount.

Important Note: If the request is for additional non-unit activities for an existing funded program and your request is approved, the non-unit budget request will be incorporated into a contract amendment with no net change to awarded total. If approved, changes in quantities will be calculated by CSF to an amount approximate to the approved non-unit total. If submitting multiple requests, those that are approved will be incorporated as a net total change to existing funded activities, units, and award amounts.

STEP 4: COMPLETE THE ACCOMPANYING TASKS IN SURVEYMONKEY APPLY

In addition to the Budget Worksheet.xlsx worksheets, you will be prompted to complete narrative tasks in SurveyMonkey Apply (SMApply) providing additional, brief overviews of the activities and expenses based on the type of amendment or request proposed.

- If you complete the *"Unit Budget Request"* tab in the *Budget Worksheet.xlsx*, then you are required to complete the task entitled *"Unit-based, new activity/program request"* within SMApply.

- If you complete the *"Non-Unit Budget Request"* tab in the *Budget Worksheet.xlsx*, then you are required to complete the task entitled *"Traditional grant request"* within SMApply.