Budget Expense Descriptions & Example Supporting Documentation

Below are some important reminders related to the financial review process, expense descriptions, and associated documentation that is needed to support the expense when reporting use of funds in SurveyMonkey Apply.

- Expenses submitted must align with activities outlined in your application.

- Detail of item/service must be clear on information provided.

- Proof of payment is required for all expenses. This can be provided by showing check remittance that aligns with invoices/contracts, cancelled check, bank account statement showing information, or credit card information on receipts.

- Period of performance must be clear on all service/non-tangible expenses. For salaries, this includes dates worked on payroll provided. For all other services, begin and end date should be clear.

- When allocating a portion of an expense, the underlying allocation method must also be provided.

- Only expense types included in your final budget will be permitted. You may borrow between funded expense types but may not use unfunded-expense types. If the submission varies greatly from the information provided in the application, we may follow up.

EXPENSE TYPE DESCRIPTIONS AND EXAMPLE DOCUMENTATION

Below is a listing of each expense type, the associated descriptions for use of funds in each expense type, and some examples of documentation that may be associated with each expense type.

Important Note: The below descriptions and examples provided for each expense type is not an exclusive listing. If unsure of expense type or needed documentation for the expense that is not mentioned below, we encourage you to reach out to your assigned CSF finance contact to receive additional guidance.

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.

Example Documentation: Payroll registers, pay stubs, and/or system-generated payroll reports.

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.

Example Documentation: Contracts, billing statements, and/or invoices.

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.

Example Documentation: Invoice (rent or maintenance), receipts, mortgage statement, rent contract and/or utility bills.

4. Training & Professional Development

Costs related to developing staff and preparing the organization to take on this project.

Example Documentation: Invoices, receipts and/or expense reports.

5. Insurance

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

Example Documentation: Invoices and/or receipts.

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.

Example Documentation: Invoices, receipts and/or expense reports.

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.

Example Documentation: Invoices and/or receipts.

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.

Example Documentation: Invoices and/or receipts.

9. Printing, Copying, & Postage

Photocopying, printing, mailings, postage, and express mail charges that are directly related to the project.

Example Documentation: Invoices and/or receipts.

10. Evaluation

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

Example Documentation: Invoices and/or receipts.

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.

Example Documentation: Invoices and/or receipts.

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.

Example Documentation: Invoices, receipts and/or expense reports.

13. Administration

This includes organizational expenses you will incur whether or not you do the project. Some organizations include as a % of management staff in this line item.

Example Documentation: Invoices and/or receipts. Could include any of expense types 1-12 that are part of general operations with corresponding allocation.

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 submissions in this expense type, we may identify that another expense type is more appropriate.

Example Documentation: Invoices and/or receipts.