**Missouri Foundation for Health Budget Guidelines**

This is the general template used for grants and is to be submitted in accordance with the Request for Application(s). If responding to a Request for Scope of Service, contact the appropriate staff member to discuss formatting.

**Budget Narrative Instructions:**

Read the instructions below before developing your budget narrative:

* Include expenses and explanations **only** for the portion of funding requested from MFH.
* Each line item must be fully explained using a narrative format as outlined beginning on the next page.
* Double click on each table to activate the EXCEL spreadsheet. Insert requested funding and the totals will automatically calculate. Insert rows or columns as needed.
* This document must be submitted as a Microsoft Word document.

Refer to **Budget Tips** throughout this document for developing a budget related to the project timeline.

*Note*: If awarded, the following documentation for the entire project period to support expenses as outlined below is required:

Expense Category Appropriate Documentation

Salary Form W-2 or Payroll Register

Contracted Services Paid Invoice

Equipment Paid Invoice

Travel Paid Invoice (airfare & hotel only)

Other Direct Paid Invoice or General Ledger detail

**This document is the template. Delete instructions, examples and tips.**

**Organization Name**

**Budget Narrative and Spreadsheet**

**FUNDING SOURCES**

*List any type of funding or earned revenue that will be generated as a direct result of MFH funding of this project. Do not include MFH request.*

Earned Revenue

Include revenue earned as a direct result of MFH funding of this project (e.g. Medicare reimbursement for services)

Other Grants

Include other grants which will support the project (state whether secured and unsecured)

In-Kind

Include in-kind support contributed by applicant or donated by other sources for this project

Double click on the table to insert numbers. It will automatically calculate. Add or delete rows or columns as needed.

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*Budget Explanation:* Provide detail for each funding source

**EXPENSE**

*The expense portion of the budget narrative should include expenses and explanations ONLY for the portion of funding requested from MFH.*

**Salary:** Salary expense is for project-related staff employed by applicant (consulting/contracted services are listed in a separate line item). State the title, name (if known) or to be hired (TBH), annual salary, and full-time equivalency (FTE) to this project. For multi-year grants, provide detail for each year.

Budget Tip:Are the positions to be hired? If so, should the FTE be adjusted to allow for recruitment time?

Double click on the table to insert numbers. It will automatically calculate. Add or delete rows or columns as needed.

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*Budget Explanation:* Provide a brief description of each position and how it relates to the project.

**Benefits and Payroll Taxes\*:** For each employee supported with Foundation funds, benefits and payroll taxes may **ONLY** be requested for:

* federal, state and local taxes
* health, life, and disability insurance related only to the Foundation funded employee(s)
* retirement related only to the Foundation funded employee(s) (do not include retiree benefits other than 401(k), 403(b) or pension)

\*Based on an agreed upon rate

Double click on the table to insert numbers. It will automatically calculate. Add or delete rows or columns as needed.

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*Budget Explanation:* Provide a breakdown of benefits and payroll taxes.

**Contracted Services:** Describe in detail the contracted services (not employed by applicant organization), including estimated hours, hourly rate, travel or other related direct expenses. For multi-year grants, provide detail for each year. *Note: Contracted Services funded for this project must adhere to MFH budget guidelines.*

Evaluation consultant:

 Professional Fees: 80 hours x $130 per hour = $10,400

 Mileage: 500 miles x $0.545 per mile = $273

 Hotel: $150 per night x 2 nights x 1 staff = $300

 Total = $10,700 (Year 1)

 *Note: Refer to contractor’s proposal submitted with application*

Budget Tip**:** Consider actual timeline for services to be provided (*i.e.,* first half, second half of the year or the entire year).

Double click on the table to insert numbers. It will automatically calculate. Add or delete rows or columns as needed.

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*Note: A proposal or contract for contracted services greater than $10,000 must be provided.*

*Budget Explanation:* Explain the benefit of the contractor to the project including scope of services, fee detail and the process and rationale for selecting the contractor.

**Equipment:** List item quantity and cost. For multi-year grants, provide detail for each year.

Double click on the table to insert numbers. It will automatically calculate. Add or delete rows or columns as needed.

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*Note: A vendor quote for equipment or construction greater than $5,000 must be provided.*

*Budget Explanation:* Provide a brief description of each item, how it relates to the project and when it is expected to be purchased. If equipment is 50% or more of the request from MFH, provide the process and rationale for selecting the equipment and the percentage of time it will be dedicated to the project.

**Travel:** Explain how travel costs are calculated. For multi-year grants, provide detail for each year.

*Note: Include travel for project staff only. Travel funded for this project must adhere to Foundation travel policy which includes coach airfare,* [*per diem*](http://www.gsa.gov/portal/category/100120) *and standard mileage not to exceed established federal rates.*

 Local Travel:

 50 weeks x 2 trips per week x 20 miles per trip x $0.545 per mile = $1,090.

 Total = $1,090 (Year 1)

 Conference Travel (name conference, city and dates, if known):

 Registration: $250 registration fee x 1 staff = $250

 Hotel: $150 per night x 2 nights = $300

 Airfare: $250 per roundtrip x 1 trip = $250

 Per Diem: $51 per day x 3 days= $150

 Total: $950 (Year 1)

Double click on the table to insert numbers. It will automatically calculate. Add or delete rows or columns as needed.

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*Budget Explanation:* Provide an explanation for travel and rationale for attending conferences related to the project, if applicable.

**Other Direct Expense:** Describe in detail any other type of direct expense related to the project not specifically listed above (e.g., printing, trainings/meetings, etc.) and explain how the costs are calculated. For multi-year grants, provide detail for each year.

Printing:

5,000 brochures x $0.50 per brochure = $2,500

Total: $2,500 (Year 1)

**Budget Tip:** Will the expenses be incurred throughout the project or related to a specific activity?

Double click on the table to insert numbers. It will automatically calculate. Add or delete rows or columns as needed.

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*Budget Explanation:* Provide an explanation for each item being requested and how it benefits the project.

**Indirect Expense:** Indirect expenses are general organizational expenses shared among projects and/or functions, such as executive management, finance, grants management, human resources or administrative and other support services, occupancy, liability insurance, utilities, facility maintenance, etc.

The Foundation allows indirect expenses up to a maximum of 15% of total compensation expense (includes salary and benefits & payroll taxes).

State the percentage of indirect expenses and show the calculation as follows:

Double click on the table to insert requested funding and the totals will automatically calculate. Add rows as needed.

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*No Budget Explanation necessary*

