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# **DESIGNING AN EFFECTIVE BUDGET NARRATIVE**

**A remote technical assistance presentation  
developed for  
2006/2007 AmeriCorps\*State applicants**

# EXAMPLE 1

## Personnel Expenses

POSITION/TITLE	QTY	ANNUAL SALARY	% TIME	TOTAL AMOUNT	CNCS SHARE	GRANTEE SHARE
Executive Director	1	\$80,000	10%	\$8,000	\$0	\$8,000
AmeriCorps Program Director	1	\$40,000	75%	\$30,000	\$20,000	\$10,000
AmeriCorps Program Coordinator	1	\$28,000	100%	\$28,000	\$28,000	\$0
Volunteer Accountant	1	\$100,000	2%	\$2,000	\$0	\$2,000
<b>TOTALS</b>				<b>\$68,000</b>	<b>\$48,000</b>	<b>\$20,000</b>

# EXAMPLE 2

## Personnel Fringe Benefits

PURPOSE	CALCULATION	TOTAL AMOUNT	CNCS SHARE	GRANTEE SHARE
Executive Director	1 person at \$80,000/year x 42.56% (includes employer-paid FICA/Medicare (7.65%), workers' compensation, unemployment insurance, medical, dental, vision, and life insurance premiums, and 401(K) contribution (34.91%) x 10% usage	\$3,404	\$0	\$3,404
AmeriCorps Program Director	1 person at \$40,000/year x 42.56% (includes employer-paid FICA/Medicare (7.65%), workers' compensation, unemployment insurance, medical, dental, vision, and life insurance premiums, and 401(K) contribution (34.91%) x 75% usage	\$12,768	\$9,576	\$3,192
AmeriCorps Program Coordinator	1 person at \$28,000/year x 42.56% (includes employer-paid FICA/Medicare (7.65%), workers' compensation, unemployment insurance, medical, dental, vision, and life insurance premiums, and 401(K) contribution (34.91%) x 100% usage	\$11,916	\$11,916	\$0
<b>TOTALS</b>		<b>\$28,088</b>	<b>\$21,492</b>	<b>\$6,596</b>

# EXAMPLE 3

## Staff Travel

PURPOSE	CALCULATION	TOTAL AMOUNT	CNCS SHARE	GRANTEE SHARE
Community Events and Meetings	30 events x 2 staff x mileage at \$.28/mile x 40 miles (roundtrip)	\$672	\$336	\$336
Host Site Management Meetings	9 meetings x 5 sites x 2 staff x mileage at \$.28/mile x 30 miles (roundtrip)	\$378	\$189	\$189
Host Site Monitoring Visits	1 visit x 5 sites x 2 staff x mileage at \$.28/mile x 30 miles (roundtrip)	\$84	\$0	\$84
Program Directors Orientation and Training	OFBCI – Lodging, meals, parking 1 meeting x mileage at \$.28/mile x 225 miles (roundtrip) (2 staff members will ride together)	\$63	\$63	\$0
IADA Director Meetings	Lodging at 4 overnights x \$90/night + per diem at 4 days x 2 staff x \$22/day + mileage at 4 trips x \$.28/mile x 225 miles (roundtrip) + parking at 4 days x \$12/day (2 staff will share accommodations and ride together)	\$836	\$627	\$209
Opening Ceremonies	OFBCI – Meal 1 event x mileage at \$.28/mile x 225 miles (roundtrip) + parking at 1 day x \$12/day (2 staff will ride together)	\$75	\$75	\$0
Mid-Year Retreat	OFBCI/IADA – Lodging, meals, parking 1 event x mileage at \$.28/mile x 225 miles (roundtrip) (2 staff will ride together)	\$63	\$63	\$0
Governor's Conference	OFBCI – Lodging, meals, parking 1 event x mileage at \$.28/mile x 225 miles (roundtrip) (2 staff will ride together)	\$63	\$63	\$0
"Reading is Fun" National Conference	1 trip x airfare at \$250/flight (roundtrip) + lodging at 3 overnights x \$150/night + per diem at 4 days x 2 staff x \$22/day + fares at \$100/each x 2 staff + registration fee at \$200/person x 2 staff (2 staff will share accommodations)	\$1,726	\$432	\$1,294
<b>TOTALS</b>		<b>\$3,960</b>	<b>\$1,848</b>	<b>\$2,112</b>

# EXAMPLE 4

## Member Travel

PURPOSE	CALCULATION	TOTAL AMOUNT	CNCS SHARE	GRANTEE SHARE
Community Events and Meetings	10 events x 10 Members x mileage at \$.28/mile x 40 miles (roundtrip)	\$1,120	\$1,120	\$0
Opening Ceremonies	OFBCI – Meal 1 event x 2 Members x mileage at \$.28/mile x 225 miles (roundtrip) + parking at 1 day x \$12/day x 2 cars (2 drivers; Members will carpool)	\$150	\$150	\$0
Mid-Year Retreat	OFBCI/IADA – Lodging, meals, parking 1 event x 2 Members x mileage at \$.28/mile x 225 miles (roundtrip) (2 drivers; Members will carpool)	\$126	\$126	\$0
Governor's Conference	OFBCI – Lodging, meals, parking 1 event x 2 Members x \$.28/mile x 225 miles (roundtrip) (2 drivers; Members will carpool)	\$126	\$126	\$0
<b>TOTALS</b>		<b>\$1,522</b>	<b>\$1,522</b>	<b>\$0</b>

# EXAMPLE 5

## Supplies

PURPOSE	CALCULATION	TOTAL AMOUNT	CNCS SHARE	GRANTEE SHARE
General Program Supplies (Paper, staples, pencils/pens, etc.)	\$100/month x 15 months	\$1,500	\$750	\$750
Computer Workstation	1 computer workstation (contains CPU tower, monitor, keyboard, and mouse) at \$900/unit + additional software licenses at \$300/each	\$1,200	\$900	\$300
Notebook Computer	1 notebook computer at \$750/unit + additional software licenses at \$300 each	\$1,050	\$750	\$300
Network Printer/Scanner	1 network printer/scanner at \$500/unit	\$500	\$500	\$0
Digital Camera	1 digital camera at \$300/each	\$300	\$300	\$0
Literacy Resources	500 "EZ Read" literacy kits (includes one learning guide, 25 tests, and three books) – 100 adult kits x \$10/each + 400 children and young adult kits x \$8.50/each	\$4,400	\$3,400	\$1,000
"Reading Makes You SMART" AmeriCorps Program Brochure	1,000 tri-fold, two-color brochures x \$.75/brochure (The brochures will be designed by the program staff and Members)	\$750	\$750	\$0
Member Service Gear	1 AmeriCorps t-shirt x 10 Members x \$15/each + 1 AmeriCorps polo shirt x 10 Members x \$20/each	\$350	\$350	\$0
<b>TOTALS</b>		<b>\$10,050</b>	<b>\$7,700</b>	<b>\$2,350</b>

# EXAMPLE 6

## Staff Training

PURPOSE	CALCULATION	DAILY RATE	TOTAL AMOUNT	CNCS SHARE	GRANTEE SHARE
Community Literacy Training	<p style="text-align: center;">“No Child Left Behind” project consultation at 7 hours x \$300/hour</p> <p>The consultant will provide guidance and technical assistance on literacy performance standards, regulations, skills development, etc. The consultant will be used on a case-by-case basis through one-on-one contact, telephone, and e-mail.</p>	\$300	\$2,100	\$1,000	\$1,100
<b>TOTALS</b>			<b>\$2,100</b>	<b>\$1,000</b>	<b>\$1,100</b>

# EXAMPLE 7

## Member Training

PURPOSE	CALCULATION	DAILY RATE	TOTAL AMOUNT	CNCS SHARE	GRANTEE SHARE
Member Orientation and Citizenship Training	2 one-day workshops = consultant at 2 days x \$540/day (includes travel and indirect costs) + room rental at \$250/day x 2 days (provided in-kind from United Way) + food at \$20/day per person x 2 days x 14 person (10 Members + 3 staff + 1 consultant) + 10 Member handbooks x \$5/each + 10 <i>We the People</i> guides x \$10/each	\$540	\$2,290	\$1,790	\$500
Member C.P.R. Training and Certification	1 one-day training = consultant at 2 days x \$540/day x mileage at \$.28/mile x 25 miles (roundtrip) + room rental at \$250/day x 1 day (provided in-kind from United Way) + food at \$15/day per person x 1 day x 13 (10 Members + 2 staff + 1 consultant) + 10 C.P.R. guides x \$15/each	\$540	\$1,682	\$1,432	\$250
<b>TOTALS</b>			<b>\$3,972</b>	<b>\$3,222</b>	<b>\$750</b>



# EXAMPLE 8

## Evaluation

PURPOSE	CALCULATION	DAILY RATE	TOTAL AMOUNT	CNCS SHARE	GRANTEE SHARE
Program Evaluation	2 evaluators (consultants) at \$100/day x 10 days/person + mileage at \$.28 x 300 miles/project x 2 evaluators (consultants) + supplies at \$150/person x 2 evaluators (consultants)	\$100	\$2,468	\$1,234	\$1,234
<b>TOTALS</b>			<b>\$2,468</b>	<b>\$1,234</b>	<b>\$1,234</b>

# EXAMPLE 9

## Other Program Operating Costs

PURPOSE	CALCULATION	TOTAL AMOUNT	CNCS SHARE	GRANTEE SHARE
Travel to CNCS-Sponsored Meetings	Flat figure of \$2,000 per the budget instructions	\$2,000	\$2,000	\$0
Member Background Checks	\$500 annual membership fee to "Background Checks R Us" (The agency employs this system for all volunteers. Therefore, the organization proposes to use 25% of the annual fee as in-kind match for the project.)	\$125	\$0	\$125
IADA Membership Fee	Annual membership dues at \$200/FTE x 10 FTEs	\$2,000	\$1,000	\$1,000
Postage – Host Sites	Postage at \$50/month x 15 months (Each host site is appropriated up to \$10/month for program-related postage.)	\$750	\$600	\$150
Duplicating – Host Sites	Copies/Printing at \$.05/each x 200 copier/month x 5 host sites x 15 months (The organization will provide this service as an in-kind to the host sites.)	\$750	\$0	\$750
<b>TOTALS</b>		<b>\$5,625</b>	<b>\$3,600</b>	<b>\$2,025</b>

# EXAMPLE 10

## Member Living Allowance

Item	No. of Members	Allowance Rate	No. without Allowance	TOTAL AMOUNT	CNCS SHARE	GRANTEE SHARE
Full Time (1700 hrs)	10	10	0	\$106,000	\$90,100	\$15,900
Half Time (900 hrs)	5	5	0	\$26,500	\$22,525	\$3,975
Reduced Half Time (675 hrs)	10	5	5	\$19,875	\$16,893	\$2,981
Quarter Time (450 hrs)	0	0	0	\$0	\$0	\$0
Minimum Time (300 hrs)	0	0	0	\$0	\$0	\$0
2 <sup>nd</sup> Year of 2-Year Half Time	0	0	0	\$0	\$0	\$0
<b>TOTALS</b>				<b>\$152,375</b>	<b>\$129,518</b>	<b>\$22,856</b>

# EXAMPLE 11

## Source of Funds

SECTION	DESCRIPTION
Section I. Program Operating Costs	Source – ABC Corporation (cash @ \$____ and in-kind support @ \$____). XYZ Foundation (cash @ \$____).
Section II. Member Costs	Source – ABC Corporation (non-federal cash @ \$____). XYZ Foundation (non-federal cash @ \$____). JKL Organization (non-federal cash @ \$____).
Section III. Administrative/ Indirect Costs	Source – ABC Corporation (in-kind support @ \$____) and XYZ Foundation (in-kind support @ \$____)