

**The Health Foundation of Central Massachusetts
Sample Activation Fund Project Budget Form**

Organization Name: ABC Nonprofit Organization
Project Name: Sample Project

Instructions: Please complete the necessary sections in white on the budget page, which will automatically update the budget narrative page. On the narrative page, please explain all budget line items. **Note:** Total Project Budget figures (Column D) should be inclusive of the amount requested from The Health Foundation and from other funding sources. **Please see Note 1 and the third tab for info on the Foundation's indirect costs policy.**

Personnel (with Fringe)								
Job Title (1 Title per line)	Base Salary	% Time (enter decimal rate)	Total Project Budget	Cash from other sources	In-kind from other sources	Amount Requested from THFCM	THFCM grant amount spent	THFCM grant balance
Project Manager	\$60,000.00	0.2	\$12,000.00	\$0.00	\$0.00	\$12,000.00	\$0.00	\$12,000.00
Executive Director	\$100,000.00	0.1	\$10,000.00	\$0.00	\$10,000.00	\$0.00	\$0.00	\$0.00
	\$0.00	0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	\$0.00	0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Subtotal Personnel			\$22,000.00	\$0.00	\$10,000.00	\$12,000.00	\$0.00	\$12,000.00
Fringe (enter as decimal rate)		0.15	\$3,300.00	\$0.00	\$1,500.00	\$1,800.00	\$0.00	\$1,800.00
Total Personnel:			\$25,300.00	\$0.00	\$11,500.00	\$13,800.00	\$0.00	\$13,800.00

Other Direct Costs (Office Expenses, Printing & Publications, Travel, Meeting Costs, etc.)							
Category	Total Project Budget	Cash from other sources	In-kind from other sources	Amount Requested from THFCM	THFCM grant amount spent	THFCM grant balance	
Travel	\$3,000.00	\$0.00	\$0.00	\$3,000.00	\$0.00	\$3,000.00	
Printing	\$1,500.00	\$0.00	\$0.00	\$1,500.00	\$0.00	\$1,500.00	
Stipends	\$5,000.00	\$0.00	\$0.00	\$5,000.00	\$0.00	\$5,000.00	
	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Total Other Direct Costs:		\$9,500.00	\$0.00	\$0.00	\$9,500.00	\$0.00	\$9,500.00
Subtotal of Personnel & Other Direct Costs:		\$34,800.00	\$0.00	\$11,500.00	\$23,300.00	\$0.00	\$23,300.00
Indirect Costs (see Note 1 and third tab for policy):		\$3,480.00	\$0.00	\$1,150.00	\$2,330.00	\$0.00	\$2,330.00

Consultants/Subcontracts/Capital Improvements/Equipment							
Category	Total Project Budget	Cash from other sources	In-kind from other sources	Amount Requested from THFCM	THFCM grant amount spent	THFCM grant balance	
Construction costs	\$150,000.00	\$75,000.00	\$0.00	\$75,000.00	\$0.00	\$75,000.00	
Training Consultant	\$5,000.00	\$0.00	\$0.00	\$5,000.00	\$0.00	\$5,000.00	
Desks and Chairs	\$10,000.00	\$0.00	\$0.00	\$10,000.00	\$0.00	\$10,000.00	
Chromebooks	\$5,000.00	\$0.00	\$0.00	\$5,000.00	\$0.00	\$5,000.00	
Total Consultants/Subcontracts/Capital Improvements/Equipment/ Costs:		\$170,000.00	\$75,000.00	\$0.00	\$5,000.00	\$0.00	\$95,000.00
TOTAL EXPENSES:		\$208,280.00	\$75,000.00	\$12,650.00	\$120,630.00	\$0.00	\$120,630.00

ADDITIONAL FUNDING SOURCES: Indicate whether funding is PENDING or SECURED under Status.							
NON-THFCM FUNDING SOURCES	Status	Grant Period (Month & Year)	Cash from other sources	In-kind from other sources	Total Cash/In-kind from other sources	Total Cash/In-kind spent	Balance from other sources
City Funding	Secured	06/26-05/27	\$75,000.00	\$0.00	\$75,000.00	\$0.00	\$75,000.00
ABC Nonprofit Organization	Secured	06/26-05/27	\$0.00	\$12,650.00	\$12,650.00	\$0.00	\$12,650.00
					\$0.00	\$0.00	\$0.00
TOTAL: THESE TOTALS SHOULD EQUAL THE CASH AND IN-KIND TOTALS ABOVE.			\$75,000.00	\$12,650.00	\$87,650.00	\$0.00	\$87,650.00

NOTE 1: The Foundation has adopted a tiered approach to determine the allowable indirect cost rate based on size of the applicant organization's annual operating budget. Please see the third tab for indirect cost policies and instructions for calculation.

**The Health Foundation of Central Massachusetts
Activation Fund Project Budget Narrative Form**

Organization Name: ABC Nonprofit Organization		
Project Name: Sample Project		
Personnel (with Fringe)		
Job Title (1 Title per line)	Amount Requested from THFCM	Brief Budget Narrative (Include name and credentials for each position)
Project Manager	\$12,000.00	Jane Doe, Project Manager, will allocate 20% of her time for project oversight
Executive Director	\$0.00	Executive Director's time will be donated by the organization as an in-kind contribution
	\$0.00	
	\$0.00	
Fringe (enter as decimal rate)	\$1,800.00	Fringe for Project Manager's time
Total Personnel:	\$13,800.00	
Other Direct Costs (Office Expenses, Printing & Publications, Travel, Meeting Costs, etc.)		
Category	Amount Requested from THFCM	Brief Budget Narrative
Travel	\$3,000.00	Estimated travel expenses for project-related meetings and events
Printing	\$1,500.00	Printing for marketing brochures
Stipends	\$5,000.00	Stipends for 10 participants at \$500 each
	\$0.00	
Total Direct Costs:	\$9,500.00	
Total Indirect Costs:	\$2,330.00	
Total Supplemental Support for Small Orgs	#REF!	
Consultants/Subcontracts/Capital Improvements/Equipment		
Category	Amount Requested from THFCM	Brief Budget Narrative
Construction costs	\$75,000.00	classroom renovation expenses - see quote from XYZ contractor attached
Training Consultant	\$5,000.00	Smith's Consulting Group for one-time training for staff - see quote attached
Desks and chairs	\$10,000.00	10 student desks and 10 chairs - see quote from Classroom Supply Store attached
Chrome books	\$5,000.00	10 Chromebooks - see quote from Office Depot attached
Total Consultants/Subcontracts/Capital Improvements/Equipment Costs:	\$95,000.00	
TOTAL AMOUNT REQUESTED:	\$120,630.00	

Allowable Percentage of Indirect Costs: The Foundation has adopted a three-tiered approach based upon the size of the applicant's annual operating budget for the most recently completed fiscal year, an amount that is self-reported on the application cover sheet.

- Smaller organizations with annual operating budgets under \$1 million may include up to 20% of the total direct costs for reimbursement of indirect costs;
- Organizations with annual operating budgets between \$1 million and \$100 million may include up to 15% of the total direct costs for reimbursement of indirect costs; and
- Larger organizations with annual operating budgets of more than \$100 million may include up to 10% of the total direct costs for reimbursement of direct costs.

Organizations with fiscal sponsors and those that operate as affiliates or subordinate organizations within larger systems should contact Foundation staff for guidance.

Indirect Cost Defined: The term indirect cost encompasses a broad range of expenses that enable an organization to offer a program, but are not specifically used to conduct program activities. Indirect expenses are typically the fixed costs of running the organization that benefit all of its programs: rent/mortgage, utilities, janitorial services, insurance, accounting, administrative and clerical staff and fundraising activities. Indirect costs are not easily identifiable with a specific program, but are, nonetheless, necessary to the operation of the program. By contrast, direct costs are those which are clearly and easily attributable to a specific program.

Calculation of Indirect Costs: The following items must be omitted from the total direct costs on which the indirect cost calculation is based: subcontracting arrangements, capital improvements (including renovation and purchase), and equipment purchases. However, the Foundation will allow applicants engaging subcontractors performing direct programmatic activities (e.g., professional evaluators or nonprofit partners responsible for specific project deliverables) to invite them to include up to ten percent of total direct costs for reimbursement of indirect costs at their discretion.