The Colorado Health Foundation™

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The Colorado Health Foundation Line-Item Budget Instructions

How to Download the Line-Item Budget:

The Line-Item Budget is an Excel spreadsheet that may be accessed on the Foundation's website (www.coloradohealth.org) or via the online application. In the online application, click on the "Line-Item Budget Form" link at the top of your screen. You will be asked if you want to Open or Save the file. Click on Save. You will be prompted to designate in which folder on your computer you would like to save the form. Select the appropriate location and click Save. When you are ready to begin filling out the form, open the Excel spreadsheet from the location you designated. Note that the Line-Item Budget Excel spreadsheet includes a number of functions that will sum columns and rows. Remember to save often.

How to Include the Line-Item Budget in your online application (how to upload):

The last page of the online application provides the opportunity to attach the required documents to your proposal. At the bottom of the page is a section with the header "Upload." From the drop-down menu, select "The Colorado Health Foundation Line-Item Budget Form" from the list. Click on the Browse button. You will be prompted to locate the saved Line-Item Budget Form on your computer. Once you locate it, click on the Open button. Click on the Upload button and the document will be attached to your proposal.

How to Write the Budget Narrative:

A Budget Narrative is a document that includes a brief explanation of each item on the Line-Item Budget form. The purpose of the budget narrative is to supplement the information provided in the budget spreadsheet by justifying how the budget cost elements are necessary to implement project objectives and accomplish the results.

For example, if you entered $100,000 in the personnel line, in the budget narrative, you would list the positions, the full time equivalents and the salary for each position and benefits (if applicable). Example:

PERSONNEL
Executive Director .75 FTE at $50,000 and $10,000 fringe benefits
Program Manager 1 FTE $50,000 and $15,000 fringe benefits

While it will vary with the complexity of your budget, a Budget Narrative is typically 1 to 2 pages long.

You will upload the Budget Narrative just as you would the Line-Item Budget form. Select "Budget Narrative" from the drop-down menu, click on the Browse button and locate the saved Budget Narrative on your computer, then click on the Open button. Click on the Upload button and the document will be attached to your proposal.

Line-Item Budget Instructions:

Program/Project or Capacity Building Requests: Please enter the revenue and expenses only for the specific program/project for each year for which you are requesting funds from The Colorado Health Foundation.

General Operating Requests: Please enter the revenue and expenses for the organization for each year for which you are requesting funds from The Colorado Health Foundation.

Proposal Revenue

Please enter approved and pending sources of revenue for each year for which you are requesting funds from the Colorado Health Foundation. All revenue must be tied to your specific request (general operating, program/project, capacity building or capital). For example, if you are requesting funds from the Colorado Health Foundation to support a specific program/project, please include all approved and pending revenue to support that program/project. Total revenue should tie to total expenses.

Colorado Health Foundation
Include the amount that you are requesting from The Foundation for each year of the request.

Foundation Grants
Include additional approved and pending Foundation grants to support the program/ project (or organization in the case of general operating grants) for each year you are requesting funding. Example if you are requesting funds for two years, include projections for Foundation grants for year one and year two.

In the Budget Narrative, please describe the Foundation grant sources (e.g. the name of the foundation, the amount and whether the grant is approved or pending).

Individual Support
Include individual donor funds dedicated to support the program/ project (or organization in the case of general operating grants) for each year for which you are requesting funding. Example if you are requesting funds for two years, include projections for individual support for year one and year two.

Corporate Support
Include corporate donor funds dedicated to support the program/ project (or organization in the case of general operating grants) for each year for which you are requesting funding. Example if you are requesting funds for two years, include projections for corporate support for year one and year two.

In the Budget Narrative, please describe the corporate grant sources (e.g. the name of the corporation, the amount and whether the grant is approved or pending).

Special Events
Include net profits from events dedicated to support the program/ project (or organization in the case of general operating grants) for each year for which you are requesting funding.

In the Budget Narrative, please describe each event (e.g. the name of event, date to be held, the amount and whether revenue is confirmed or pending).

Earned Revenue
Include dollars your program/project (or organization in the case of general operating grants) derives from its operations.

Contract Revenue
Include dollars your program/project (or organization in the case of general operating grants) derives from outside contracts.

In-Kind
Enter costs that are provided or donated at no actual cost to the project/program (or organization in the case of general operating grants) This includes any staff that donate time, facilities (in the form of rent/lease expense) supplies, computer, or any others listed in the Administrative or Program types of costs.

Proposal Expenses

DIRECT COSTS

General Operating
This line-item is reserved for general operating requests. Please note, the Foundation will only award general operating requests to organizations whose mission directly align with our vision and outcome areas. Requests can include day-to-day activities or ongoing expenses such as administrative salaries and benefits, utilities, office supplies, technology maintenance, etc., as well as for project costs, technology purchases and professional development.

In the far right side of the spreadsheet, please enter the portion of general operating funds you are requesting from the Colorado Health Foundation.

In the budget narrative, document each line-item within your general operating request. For example, for administrative salaries and benefits, be sure to list each position, %FTE, accompanying salaries and fringe benefits.

Program/Project Costs

Personnel
In the case of program and project requests, please enter the total salaries and benefits of persons who are directly employed to support the proposed program or project. This does not include consultants or contract workers who are not considered regular employees of the organization.

In the far right side of the spreadsheet, please enter the portion of program/project personnel funds you are requesting from the Colorado Health Foundation.

In the budget narrative, document each position to include %FTE, accompanying salaries and fringe benefits applied in the request.

Program Costs
Please enter costs directly associated with delivering your program's services (example: outreach, marketing, meetings, conferences, travel, etc.). If requesting capacity-building support, include these costs in the programming/project costs and give a detailed explanation of expenses in the budget narrative. Again, be sure to include all related personnel costs within the personnel line-item above. There is also a section below to input related administrative costs.

In the far right side of the spreadsheet, please enter the portion of program/project funds you are requesting from the Colorado Health Foundation.

In the budget narrative, break-out specifics of program costs requests (e.g. total dollars for outreach activities, total meeting costs, etc.).

Administrative costs related to program
Please enter administrative costs that are directly attributable to delivering your program's services (example: lease/rent, office materials, phone, computers) and administering the grant.

In the far right side of the spreadsheet, please enter the portion of related administrative costs you are requesting from the Colorado Health Foundation.

Separate costs and add justifications in your budget narrative.

Capital
This line-item is reserved for capital and equipment requests to include bricks and mortar; permanent fixtures added either to the structure or real estate; or significant equipment needs. If you have questions about what to include in this line-item, please contact the Foundation.

OTHER COSTS

Consultants:
Please enter costs for contract workers who are not regular employees of the organization, such as a board development consultant who is brought in for a specific time-limited purpose.

Fiscal Sponsor Fee (if applicable):
If you have questions about fiscal sponsor arrangements, please contact the Foundation.

Indirect Costs (If applicable):
This line-item is reserved for colleges and universities only. The Foundation allows a maximum of 10 percent of direct costs and does not pay indirect costs on consultants/subcontracts or equipment. A federally negotiated indirect rate does not qualify for indirect costs to be supported by the Foundation.