

Switzer Foundation Leadership and Collaborative Grant Budget Guidelines February 2011

For Leadership and Collaborative Initiative Grant requests, detailed budgets are required as part of the proposal materials. Here are some general guidelines that should help you prepare materials that are appropriate for the size and scale of the project or organization

- Think of budgeting on two or three levels depending on the size of the organization – Project, Program, Organizational.
 - o Project Scale - the scope of the project might be defined simply around the Fellow (LG) or Fellows (CIF) and include staff hours, expenses and overhead and revenue specifically for the project proposed
 - o Program Scale – The project noted above might be one of several projects within a program area of a larger organization
 - o Organizational Scale - The project is part of a smaller, possibly start-up organization and the project budget is integral to the organization as a whole.
- In all cases, please provide a project (or program) budget that delineates the scope of funding sources (**revenue**) and **expenses** anticipated for the project. Include a separate column that shows how the Switzer F grant would be applied to the project. (See spreadsheet example.)
- In all cases, please include a budget for the organization as a whole. Typically it is wise to include a budget or budgets that show the current projected budget for the year in which project funds are requested and the actual budget figures for the prior FY of the organization. This allows us to see the actual scope of the organization in terms of revenue and expenses for prior year and how the current year compares. Please indicate if these have been audited or not. We understand that audited statements take time to produce. You may provide an electronic copy of audited financial statements if available. These are not automatically required but may be requested.
- Please indicate in revenue section which funds are in-hand.
- When possible, please indicate whether matching funds are available. If other staff time is provided as in-kind match, please include this on the revenue side if the funds are also supporting the project.
- It may be more convenient to include a narrative with your project budget that provides additional explanation for budget revenue and expenses. These can be simple footnotes noting expected decision dates for pending grants or the basis for expenses – for example – If \$1,000 is on budget line for Professional development in the Switzer F column, the footnote can indicate - \$500 for registration for Land Trust Rally and \$500 for communications training)

For grant reports:

- When submitting a grant report at the conclusion of the grant period, please indicate actual expenditures of grant against the budgeted amount. Please remember that any significant changes to budget (>10%) need to be approved in advance.

SAMPLE BUDGET FOR LEADERSHIP AND COLLABORATIVE INITIATIVE GRANTS

**ENVIRONMENT PROGRAM BUDGET OF Env NGO
FY 11 Budget (January -December 2011)**

| REVENUE | Budget | Switzer F | Actual (for grant reports only!) | Switzer F actual |
|-----------------------------------|-------------------|------------------|--|-----------------------------|
| Foundation A (pending) | \$ 5,000 | | \$ 5,000 | |
| Foundation B (pending) | \$ 10,000 | | \$ 10,000 | |
| Foundation C (confirmed) | \$ 20,000 | | \$ 10,000 | |
| Switzer Foundation | \$ 30,000 | \$ 30,000 | \$ 30,000 | \$ 30,000 |
| Other Foundations | \$ 20,000 | | \$ 15,000 | |
| State Grants | \$ 10,000 | | \$ 10,000 | |
| Fed Grants | \$ - | | \$ - | |
| Individual donations | \$ 5,000 | | \$ 5,000 | |
| TOTAL | \$ 100,000 | \$ 30,000 | \$ 85,000 | \$ 30,000 |
| EXPENSES | | | | |
| Exec Dir (5% time) | \$ 5,000 | | \$ 5,000 | |
| Switzer Fellow (sal and benefits) | \$ 50,000 | \$ 24,000 | \$ 50,000 | \$ 24,000 |
| Travel | \$ 10,000 | \$ 1,000 | \$ 5,000 | \$ 500 |
| professional development | \$ 2,000 | \$ 1,000 | \$ 2,000 | \$ 1,000 |
| office exps (tel, postage, etc.) | \$ 5,000 | \$ 500 | \$ 5,000 | \$ 500 |
| meeting expenses | \$ 10,000 | \$ 1,000 | \$ 5,000 | \$ 1,500 |
| consultants | \$ 9,000 | | \$ 5,000 | |
| subtotal | \$ 91,000 | \$ 27,500 | \$ 77,000 | \$ 27,500 |
| overhead (~10%) | \$ 9,000 | \$ 2,500 | \$ 8,000 | \$ 2,500 |
| TOTAL | \$ 100,000 | \$ 30,000 | \$ 85,000 | \$ 30,000 |