

Switzer Foundation Leadership and Network Innovation Grant Budget Guidelines

September 2016

For Leadership and Network Innovation Grant proposals:

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 (for Leadership Grants) or Fellows (for Network Innovation Grants) and include staff hours, expenses, 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 budget that delineates the scope of funding sources (**revenue and expenses**) anticipated for the project. Include a separate column that shows how the Switzer Foundation grant would be applied to the project. (See spreadsheet example.) Include a program budget if useful to show the scale of the project relative to the program area as a whole.
- In all cases, please include a budget for the organization. **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 fiscal year of the organization.** This allows us to see the organization’s revenue and expenses for the 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 the most recent audited financial statements if available.
- Please indicate in the revenue section which funds are in-hand and which requests are still pending.
- 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 the budget line for Professional Development in the Switzer Foundation 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 use the same budget format as you did for the proposal**, adding a column showing actual expenditures of the grant against

the amount in the proposal budget. Please remember that any significant changes to the budget (>10%) need to be approved in advance.

SAMPLE BUDGET FOR LEADERSHIP AND NETWORK INNOVATION GRANTS

**ENVIRONMENT PROGRAM BUDGET OF Env NGO
FY 14 Budget (January -December 2014)**

REVENUE	Budget	Switzer F	Actual <i>(grey area for grant reports only!)</i>	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