

COMPLETING EXCEL BUDGET TEMPLATES FOR GRANT APPLICATIONS



Hogg Foundation
for Mental Health

ADVANCING RECOVERY AND WELLNESS IN TEXAS



Completing Excel Budget Templates for Grant Applications

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GENERAL INSTRUCTIONS

- The template includes several budget categories which are separated by tabs including Personnel, Contractors and Consultants, Meetings and Events, Travel, Materials and Supplies, etc.
- Please review the General Instructions tab for directions on how to input requested funding amounts for each budget category.
- Please note that some categories or line items may not be applicable to the funding opportunity for which you are applying. Complete the categories relevant to your project.
- Please enter the legal applicant name in Cell B5 of the General Instructions tab on this worksheet.

General Instructions for Completing Proposed Budget Forms with Narrative

Please type legal name of applicant in box below (B5)

Name Here

Budget Summary: Do not input information on this sheet. Cells will auto-populate according to information on subsequent sheets.

Personnel: Identify each employee that will work on the project and provide a brief justification for each position. If the position is to be filled by an existing staff person, include the person's name and attach a resume to the proposal. If the position requires the hiring of a new employee, input "TBD" in the "name" cell and attach a job description to the proposal. If the project includes more than one organization, include personnel costs related to the grant for each partner entity.

For each year of the grant period, indicate each employee's percentage of full-time equivalent (FTE), each employee's annual salary, the percentage of time that each employee will dedicate to grant objectives and each employee's fringe percentage. All other cells will self-populate.

Contractors and Consultants: List each contractor and consultant. Provide a brief description of the services they will provide.

For each year of the grant period, indicate the method used to calculate contractor or consultant payment (jump sum, hourly, weekly, monthly, etc.), indicate the number of units each contractor or consultant is expected to work (number of hours, number of weeks, number of months, number of tasks, etc.) and indicate the rate of payment for each contractor or consultant (hourly rate, weekly rate, monthly rate, per task rate, etc.)

Meetings and Events: List and provide a brief description of each meeting and event related to the grant objectives. Indicate the costs for each meeting or event, including space rental, equipment rental, consumer, youth and family support stipends, and food, if applicable.

Overnight Travel: Provide a brief description of the purpose of the proposed overnight travel and how it relates to the grant objectives. Indicate the city and state of the final destination. Indicate the total number of days and total number of traveling employees. For each overnight trip, provide a brief justification of expenses in each travel expense category.

Non-Overnight Travel: Provide a brief description of non-overnight travel, indicating the anticipated mileage, reimbursement rate and other costs. This is commonly referred to as local travel

Divisions note that travel events will not be reimbursed for non-overnight travel (flights)

General Instructions | Budget Summary | Personnel | Contractors and Consultants | Meetings and Events | Overnight Travel | Non-Overnight Travel | Materials Supplies | Overhead

BUDGET SUMMARY

- This sheet auto-populates based on the information entered on each budget category tab. This sheet is locked and the applicant will not be able to enter anything on this sheet. Please add your budget information in each budget category tab located at the bottom of the workbook.

The screenshot shows an Excel spreadsheet titled "BUDGET SUMMARY". The spreadsheet is divided into three main sections: Personnel, Contractors, and Meetings and Events, each with three columns representing Grant Period 1, Grant Period 2, and Grant Period 3. The Personnel section includes rows for individual employees with columns for Name Here, Amount, and Total. The Contractors section includes rows for contractor names and amounts. The Meetings and Events section includes rows for various activities like Launch Party, Mental Health Week Event(s), Unwind Before the Grind, and Career Day Retreat, with columns for Name Here, Amount, and Total. The total for Personnel across all three periods is \$89,862.80.

PERSONNEL

Complete the following items on this sheet in sequence:

- Identify each employee that will work on the project. If the person is an existing staff member, include the person's name, job title and credentials, and upload his or her resume. If the person will be a new hire, then input "TBD" and provide a job description in your uploaded application materials.

Name of Applicant:	
Employee Name or TBD - Functional Title	
Jane Smith, LCSW	
Principal Investigator, Lecturer	

2. Provide justification for each position.

Justification
<p>Jane Smith is a nationally recognized leader in the field of educational assessment in mental health and will be directly responsible for developing each aspect of the curriculum.</p>

3. The foundation requests that applicants use full-time equivalent (FTE) to calculate salaries. A FTE is the hours worked by one employee on a full-time basis, typically considered 40 hours per week. To calculate salaries, enter each employee’s full-time equivalent (FTE) for each grant period. A 40-hour employee should be shown as 1.00, 30 hours as 0.75 and 20 hours as 0.50. Then enter the calculated full-time annual salary, percentage of time that will be spent on the grant objectives, and fringe percentage.

The Certified Peer Specialist will implement the training program full-time over year 1. As more employees are trained in grant years 2 and 3 the Certified Peer Specialist will reduce the number of hours spent on the training program implementation.	FTE (ex. 1.0, .5,.75)	1.00	FTE (ex. 1.0, .5,.75)	0.75	FTE (ex. 1.0, .5,.75)	0.50
	Total Annual Salary	\$ 41,600.96	Total Annual Salary	\$ 43,276.24	Total Annual Salary	\$ 45,007.29
	% of Time on Grant Objectives	100%	% of time on Grant Objectives	100%	% of time on Grant Objectives	100%
	Total Salary Requested	\$ 41,600.96	Total Salary Requested	\$ 32,457.18	Total Salary Requested	\$ 22,503.65
	Fringe Percentage	28%	Fringe Percentage	28%	Fringe Percentage	28%
	Total Fringe Requested	\$11,648	Total Fringe Requested	\$9,088	Total Fringe Requested	\$6,301
	Total Compensation Requested for Project	\$53,249	Total Compensation Requested for Project	\$41,545	Total Compensation Requested for Project	\$28,805

FTE example with multiple employees in one position: You have three employees in the same position and they work 30 hours, 20 hours and 10 hours per week – totaling 60 hours. Assuming a full-time employee works 40 hours per week, your full-time equivalent calculation would be 60 hours divided by 40 hours, or 1.5 FTE.

Youth Therapy Engagement - Over the course of the grant 3 part-time therapists will lead the engagement program at four middle schools for a total of 60 hours each week.	FTE (ex. 1.0, .5,.75)	1.50	FTE (ex. 1.0, .5,.75)	1.50	FTE (ex. 1.0, .5,.75)	1.50
	Total Annual Salary	\$ 44,502.96	Total Annual Salary	\$ 45,792.04	Total Annual Salary	\$ 47,107.88
	% of Time on Grant Objectives	100%	% of time on Grant Objectives	100%	% of time on Grant Objectives	100%
	Total Salary Requested	\$ 66,754.44	Total Salary Requested	\$ 68,688.06	Total Salary Requested	\$ 70,661.82
	Fringe Percentage	28%	Fringe Percentage	28%	Fringe Percentage	28%
	Total Fringe Requested	\$18,691	Total Fringe Requested	\$19,233	Total Fringe Requested	\$19,785
	Total Compensation Requested for Project	\$85,446	Total Compensation Requested for Project	\$87,921	Total Compensation Requested for Project	\$90,447

Please note applicants can make adjustments based on employee schedules as long as the justification and salary request match. Please see the example below for three part-time Graduate Assistants.

Justification	GP1 7/1/2017-6/30/2018		GP2 7/1/2018-6/30/2019		GP3 7/1/2019-6/30/2020	
Total Graduate Assistant stipend is proposed at \$24,000 per year. This figure includes semester stipend and tuition remission. Graduate Assistants will provide direct mental and behavioral health services to students at Austin Elementary campus. GA time will be 100% spent on grant objectives. Expenses estimated at \$4,000 per semester X 2 semesters X 3 students per year.	FTE (ex. 1.0, .5,.75)	3.00	FTE (ex. 1.0, .5,.75)	3.00	FTE (ex. 1.0, .5,.75)	3.00
	Total Annual Salary	\$ 8,000.00	Total Annual Salary	\$ 8,000.00	Total Annual Salary	\$ 8,000.00
	% of Time on Grant Objectives	100%	% of time on Grant Objectives	100%	% of time on Grant Objectives	100%
	Total Salary Requested	\$ 24,000.00	Total Salary Requested	\$ 24,000.00	Total Salary Requested	\$ 24,000.00
	Fringe Percentage	0%	Fringe Percentage	0%	Fringe Percentage	0%
	Total Fringe Requested	\$0	Total Fringe Requested	\$0	Total Fringe Requested	\$0
	Total Compensation Requested for Project	\$24,000	Total Compensation Requested for Project	\$24,000	Total Compensation Requested for Project	\$24,000

- All other cells will auto-populate.

CONTRACTORS AND CONSULTANTS

- For each grant period, list all contractors or consultants and include a brief description of their services. Indicate the method of payment, how often the person will be paid (units), and the rate of payment. Please note that only the first \$50,000 of contractor expenses will be included in subtotal used to calculate overhead.

Lump Sum Example

CONTRACTOR or CONSULTANT NAME (Agency, Individual or TBD)	DESCRIPTION OF SERVICES (Scope of Work)	GP1 7/1/2017-6/30/2018		GP2 7/1/2018-6/30/2019		GP3 7/1/2019-6/30/2020	
		Method of Payment (Hourly, Weekly, Monthly, Lump Sum)	Lump Sum	Method of Payment (Hourly, Weekly, Monthly, Lump Sum)	Lump Sum	Method of Payment (Hourly, Weekly, Monthly, Lump Sum)	Lump Sum
TBD	Translation service expenses are estimated to be a flat rate of \$2,500 per year. This figure includes translation of intake forms and handouts into Spanish for trainings.	UNITS (# of hours, weeks, months, etc.)	1	UNITS (# of months, hours)	1	UNITS (# of months, hours)	1
		RATE OF PAYMENT (i.e., Hourly Rate, Unit Rate, Lump Sum Amount)	\$ 2,500.00	RATE OF PAYMENT (i.e., Hourly Rate, Unit Rate, Lump Sum Amount)	\$ 2,500.00	RATE OF PAYMENT (i.e., Hourly Rate, Unit Rate, Lump Sum Amount)	\$ 2,500.00
		Total	\$ 2,500.00	Total	\$ 2,500.00	Total	\$ 2,500.00

Hourly Example

CONTRACTOR or CONSULTANT NAME (Agency, Individual or TBD)	DESCRIPTION OF SERVICES (Scope of Work)	GP1		GP2		GP3		GP4	
		Method of Payment (Hourly, Weekly, Monthly, Lump Sum)	Hourly	Method of Payment (Hourly, Weekly, Monthly, Lump Sum)	Hourly	Method of Payment (Hourly, Weekly, Monthly, Lump Sum)	Hourly	Method of Payment (Hourly, Weekly, Monthly, Lump Sum)	Hourly
Jill Smith	Jill Smith's rate is calculated at 308 hours (260 + 48) per year. Ms. Smith is a Certified Peer Specialist and an experienced educator in the mental healthcare community. As a consultant to the program, Ms. Smith's time will include advising the program directors and staff on the dissemination/ training protocol (approximately 5 hours per week x 52 weeks for a total of 260 hours). She will also accompany the team on site visits to participating organizations to facilitate the work of the coordinating center to ensure the continuity of the recovery (approximately 12 visits per year x 4 hours per visit for a total of 48 hours).	UNITS (# of hours, weeks, months, etc.)	308	UNITS (# of months, hours)	308	UNITS (# of months, hours)	308	UNITS (# of months, hours)	308
		RATE OF PAYMENT (i.e., Hourly Rate, Unit Rate, Lump Sum Amount)	\$ 28.43	RATE OF PAYMENT (i.e., Hourly Rate, Unit Rate, Lump Sum Amount)	\$ 28.43	RATE OF PAYMENT (i.e., Hourly Rate, Unit Rate, Lump Sum Amount)	\$ 28.43	RATE OF PAYMENT (i.e., Hourly Rate, Unit Rate, Lump Sum Amount)	\$ 28.43
		Total	\$ 8,756.00	Total	\$ 8,756.00	Total	\$ 8,756.00	Total	\$ 8,756.00

MEETINGS AND EVENTS

- List and provide a brief description of each meeting and event related to the grant objectives. Include all the costs as applicable for each meeting including space and equipment rental, speaker expenses, supplies and food. Please note that materials and supplies included in this section should be specifically for the meeting or event.

Meeting or Event	Description	GP1 7/1/2017-6/30/2018		GP2 7/1/2018-6/30/2019		GP3 7/1/2019-6/30/2020	
		ISD Campus and Community Trainings - 18 annually	Supply expenses are estimated to be \$5,400 per year - \$5,040 + \$360. This figure includes general office supplies (folders for client information, paper for copies) @ \$40 per month X 9 months (Total - \$360). Also included are marketing expenses and training supplies for activities (such as self-stick wall pads for writing group answers to activities, fidgets, group activity games, craft supplies, handouts) at an average \$280 per meeting X 18 meetings per school year (Total \$5,040).	Space Rental	\$0	Space Rental	\$0
Equipment Rental	\$0			Equipment Rental		Equipment Rental	
Speaker Expenses	\$0			Speaker Expenses	\$0	Speaker Expenses	\$0
Materials and Supplies	\$5,400			Materials and Supplies	\$5,400	Materials and Supplies	\$5,400
Food	\$0			Food	\$0	Food	\$0
Other	\$0			Other	\$0	Other	\$0
Total	\$5,400			Total	\$5,400	Total	\$5,400

Meeting or Event	Description	GP1 7/1/2017-6/30/2018		GP2 7/1/2018-6/30/2019		GP3 7/1/2019-6/30/2020	
		Faculty Steering Committee Long Planning Meeting	Faculty Steering Committee will meet each fall and spring semester for a long meeting to plan, brainstorm, and leave with tangible outcomes. Each meeting will have a distinct task and each will last approximately 4 hours, and expenses include: Space Rental: \$150 room fee Equipment Rental: \$75 LCD projector Speaker Expenses: \$0 Materials: 10 people x \$7 per person (planning workbook) Food: 10 people x \$15 per person for lunch	Space Rental	\$150	Space Rental	\$150
Equipment Rental	\$75			Equipment Rental	\$75	Equipment Rental	\$75
Speaker Expenses	\$0			Speaker Expenses	\$0	Speaker Expenses	\$0
Materials and Supplies	\$70			Materials and Supplies	\$70	Materials and Supplies	\$70
Food	\$150			Food	\$150	Food	\$150
Other	\$0			Other	\$0	Other	\$0
Total	\$445			Total	\$445	Total	\$445

OVERNIGHT TRAVEL

- The Hogg Foundation uses the State of Texas maximum allowable reimbursement rates for travel planning. Please see the Texas Comptroller [website](#) for current reimbursement rates.
- All travel requests should include the following items:
 - Purpose of the travel, including the name of the conference or event and goal of attending
 - Destination location
 - Number of days and employees attending
 - Justification of expense with breakout of expenses

Overnight Travel Example

				GP1 7/1/2017-6/30/2018	
Purpose of Travel	Destination Location City/State	Number of Days-Employees	Justification <small>(i.e. Airfare = \$400 flights X 3 employees, Lodging = \$120 Hotel X 3 employees X 5 nights)</small>	Travel Costs	
Annual Conference - Center for School Mental Health. The conference offers participants numerous opportunities to advance knowledge and skills related to school mental health practice, research, training, and policy.	Washington, DC	3/2	Airfare = \$560 x 2 employees Lodging = \$290 hotel x 2 employees x 3 nights Meals = \$45 per day x 2 employees x 3 days Rental car, parking, and gas = \$220 (shown in other costs) Registration fee - \$525 x 2 employees (shown in other costs)	Mileage	\$0
				Airfare	\$1,120
				Meals	\$270
				Lodging	\$1,740
				Other Costs	\$1,270
				Total	\$4,400

In-State, Overnight Travel Example

				GP1 7/1/2017-6/30/2018	
Purpose of Travel	Destination Location City/State	Number of Days-Employees	Justification <small>(i.e. Airfare = \$400 flights X 3 employees, Lodging = \$120 Hotel X 3 employees X 5 nights)</small>	Travel Costs	
Certified Peer Specialist Continuing Education Training	Austin, TX	2/1	Mileage from Houston to training site approximately 170 miles round trip = 340 miles x \$0.51 reimbursement = \$173 Overnight Lodging - \$130 per night Meals - \$41 per day Parking at hotel - \$10	Mileage	\$173
				Airfare	\$0
				Meals	\$41
				Lodging	\$130
				Other Costs	\$10
				Total	\$354

NON-OVERNIGHT TRAVEL

- Provide a brief description of non-overnight travel. Indicate the anticipated mileage, reimbursement rate and other costs. This is referred to as local or day travel. Please note that meal and lodging costs will not be reimbursed for non-overnight travel.

Non-Overnight Local or Day Travel	GP1 7/1/2017-6/30/2018				
	Description of Non-Overnight Travel	Number of Miles	Mileage Reimbursement Rate	Mileage Cost	Other Costs (i.e. parking, rental car, tolls)
Local travel to 9 schools for the School Grief Support Project consisting of a total of four 90-minute sessions per week for 8 weeks	3600	\$0.510	\$1,836	\$0	\$1,836
	0	\$0.000	\$0	\$0	\$0
	0	\$0.000	\$0	\$0	\$0
	0	\$0.000	\$0	\$0	\$0
	0	\$0.000	\$0	\$0	\$0
	0	\$0.000	\$0	\$0	\$0
			\$0		\$0
Total Non-Overnight Travel GP1					\$1,836

MATERIALS AND SUPPLIES

- Justify the purpose and cost of materials and supplies that are necessary for the project, such as postage, office supplies, photocopying and communications materials (brochures, promotional items, etc.).

GP1 7/1/2017-6/30/2018				
Description of Item	Purpose & Justification	Number of Units	Cost Per Unit	Total
Faculty guidebook	Will be a visual, hard copy to pass out to faculty about how to incorporate well-being into their classrooms	3500	\$ 1.80	\$6,300
Promotional items	To help advertise the Initiative on campus	2000	\$ 1.00	\$2,000
Laptop computer for WBLE Coordinator	Technology needs	1	\$2,000.00	\$2,000
Misc office supplies	Office supplies such as paper, pens, folders, etc.	1	\$ 300.00	\$300
Total Materials and Supplies				\$10,600
			GP1	\$10,600
GP2 7/1/2018-6/30/2019				
Description of Item	Purpose & Justification	Number of Units	Cost Per Unit	Total
Postcard promotional	A short postcard that sums up the Initiative in order to quickly "pitch" to faculty and departments	1000	\$ 0.30	\$300
Misc office supplies	Office supplies such as paper, pens, folders, etc.	1	\$ 300.00	\$300
			\$ -	\$0
			\$ -	\$0
Total Materials and Supplies				\$600
			GP2	\$600
GP3 7/1/2019-6/30/2020				
Description of Item	Purpose & Justification	Number of Units	Cost Per Unit	Total
Acknowledgement Plaque	A small plaque to acknowledge faculty members for their close involvement with the Initiative	10	\$ 40.00	\$400
Misc office supplies	Office supplies such as paper, pens, folders, etc.	1	\$ 300.00	\$300
			\$ -	\$0
			\$ -	\$0
Total Materials and Supplies				\$700
			GP3	\$700

OVERHEAD

- No entry is necessary in this section. The budget worksheet will auto-populate the overhead field. Overhead will be calculated at 10 percent of the total budget for each grant period. Please note that only the first \$50,000 of contractor expenses will be included in the total used to calculate overhead.

Overhead Budget Category Detail Form			
THIS SHEET SELF-POPULATES- NO ENTRY NECESSARY			
Name of Applicant:		Grantee	
GP1			
Subtotal		Contractors	Modified Subtotal
\$	52,234.00	\$11,500.00	\$ 52,234.00
		RATE	OVERHEAD SUBTOTAL
Overhead will be calculated based on a percentage of the total award. Only the first \$50,000 of contractor expenses will be included in the subtotal used to calculate overhead.		10%	\$ 5,223

SPECIAL NOTE FOR MAC AND NUMBERS USERS

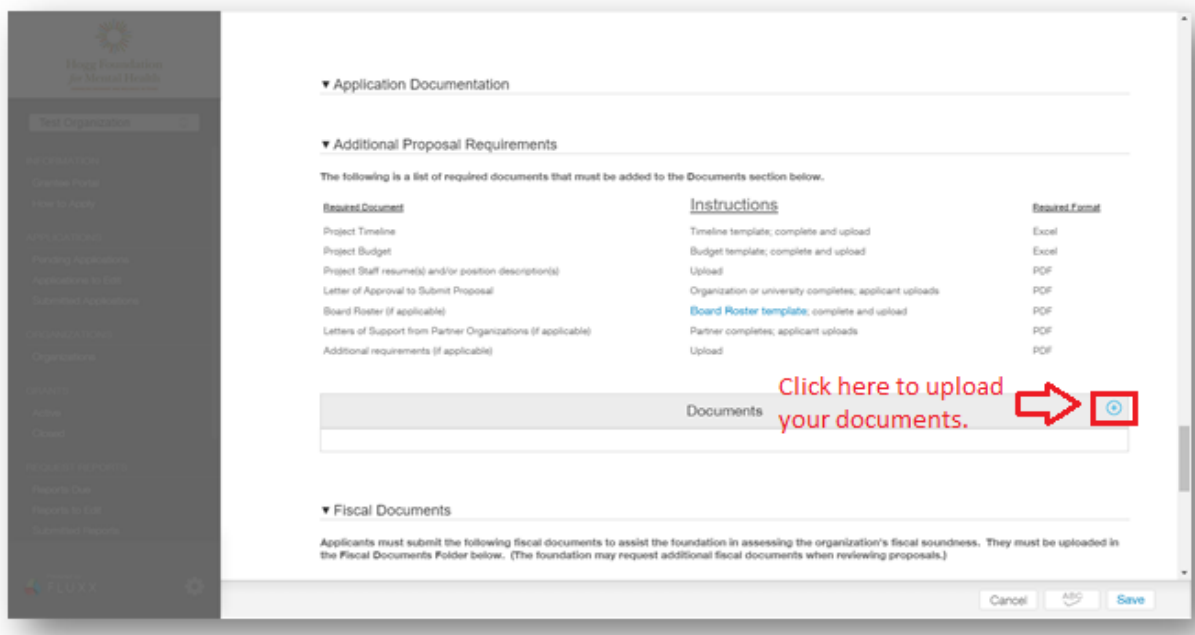
The Hogg Foundation requires budgets be submitted in Excel format. Follow this additional step if you use the Numbers application instead of Microsoft Excel:

- Save the Numbers file on your Mac by selecting Excel format from the file menu. Once you save it in Excel format, you can upload the document to your application.

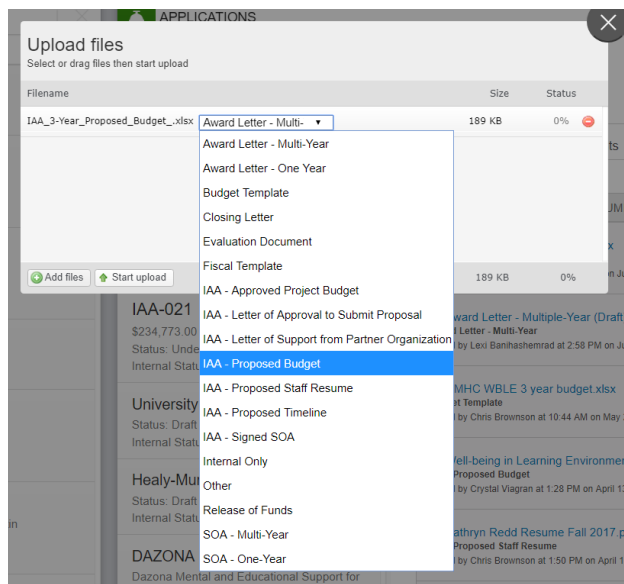
SUBMITTING YOUR BUDGET IN FLUXX

- Upload your budget to the required Application Documents section.
- Press the blue “+” to the right of the Documents heading to add your Excel file.

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- Click “Add files” to upload your budget to the dialogue box and choose “Proposed Budget” from the drop-down menu. Click “Start Upload”.



- Once your budget is uploaded you can save or submit your application. Please note each document must be properly identified from the drop-down menu as the required document type while uploading. **You will not be able to submit your application if the required documents are not properly identified.**