Credit: Krista Schlyer
Credit: Living Classrooms
Credit: Krista Schlyer

Budget 101
October 9, 2018

DEPARTMENT
OF **ENERGY &**
ENVIRONMENT

Credit: Krista Schlyer

AGENDA

1. Welcome & Introductions

2. Last Week Recap

3. Budget 101

4. Budget Narrative

5. Community Stormwater Solutions Grantee

6. Workbook Activities

Credit: Krista Schlyer

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LAST WEEK...

Credit: Krista Schlyer

EXAMPLE WORK PLAN

Applicant: Blue Badgers, Inc.	Project Title: Bring Back Blue Badgers
GOAL 1: Three Community Cleanups	

Specific and Measurable Objectives & Activities:
Stratgey#1: Recruit 15 volunteers

Key activities needed to accomplish this:	Responsible Staff	Timeframe
• Confirm date, time, and location of community cleanups • Create event flyers • Share event with community partners • Market event on social media and listservs	Susan Stormwater Walter Waters	April 2019 – May 2019

WORK PLAN TIPS

◇ Be Clear.

◇ Be Concise.

◇ Be Consistent.

Credit: Krista Schlyer

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HOW TO MEASURE SUCCESS

Outputs are quantifiable.

200 bags of trash.

Outcomes are the larger goals. Think big picture.

Increased population of Blue Badgers on Make Believe Island.

Deliverables are tangible.

Litter prevention signs on Make Believe Island.

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REQUIRED DOCUMENTS

With your proposal, you must submit a number of required documents.

For all DOEE grants, these documents are listed in Section 3.4 of the RFA.

For Community Stormwater Solutions Grants, you will upload these into the "Attachments" section of the ZoomGrants online application system.

Begin compiling these documents early!

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SUPPORTING DOCUMENTS

Supporting documents strengthen a proposal by providing additional details so that the review panel can more fully understand the project.

Common types of supporting documents:

❑ Letters of Support from organizations, individuals, association, or any entity that you have listed in the proposal as supporting the project.

❑ Maps

❑ Images

❑ Diagrams

LETTER OF SUPPORT

❑ Ask in advance – Use your elevator speech!

❑ Provide template with description of your project

❑ Organization's letterhead (logo and address)

❑ Date

❑ Contact Information

❑ Signature

BUDGET 101

WHAT else is it called?

- Budget Summary

- Budget Request

WHEN is it used?

- Always

WHY is it used?

- A budget tells the funder specifically what you are requesting for funding, item by item.

- A budget is **NOT** a lump sum.

Credit: Building Bridges Across the River

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BUDGET INCLUDES:

- ✓ Salary (Personnel)
- ✓ Benefits
- ✓ Indirect Costs
- ✓ Travel
- ✓ Contractual Services
- ✓ Materials & Supplies
- ✓ Equipment
- ✓ Matching Funds
- ✓ In – Kind Donations

Credit: Department of Energy and Environment

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ALLOWABLE COSTS:

- ✓ Rental of office space, some vehicles, and some equipment;

- ✓ Employee salaries and benefits;

- ✓ Contractor labor, including professional services;

- ✓ Accounting and bookkeeping services;

- ✓ Communications, including telephone and data services;

- ✓ Printing, reproduction, including signage;

- ✓ Materials and supplies;

- ✓ Computers and printers;

- ✓ Small tools;

- ✓ Some field equipment, typically below $5,000 in value;

- ✓ Postage and shipping;

- ✓ Fiscal Agent Fees

- ✓ Necessary travel, meals and lodging; and

- ✓ Insurance.

FOUND IN RFA!

NON-ALLOWABLE COSTS:

X   Major equipment, like vehicles

X   Lobbying, including salaries,

    overheads, and out of pocket

    expenses

X   Entertainment

X   Interest payments on loans

X   Food

X   Land purchases

FOUND IN RFA!

EXAMPLE BUDGET TABLE

Budget Category	Requested Funds	Matching Funds	In-Kind Donations	Total Project Cost
Personnel				
Susan Stormwater	$6,000.00			
Walter Waters	$4,000.00	$4,000.00		
Holly Helper		$2,000.00		
Student Volunteer			$1,000.00	
Indirect (6%)	$600.00			
Benefits (15%)	$1,500.00			
Direct Costs				
Contractor	$1,250.00	$2,000.00		
Travel	$150.00			
Planting Supplies	$5,500.00		$500.00	
Cleanup Supplies	$500.00			
Litter Prevention Signs		$1,000.00		
TOTAL	**$19,500.00**	$9,000.00	$1,000.00	$29,525.00

INDIRECT COSTS

Costs that are difficult, or impossible, to assign to a specific project. Sometimes called "overhead". Indirect costs are usually a percentage of the budget.

Examples:

- Utilities (heating, lighting, AC)

- Chairs

- Internet

- Phone

Credit: Krista Schlyer

BENEFITS

Benefits typically include social security, retirement, and health insurance. These costs are a percentage of the total salary requested.

Credit: Dance Place

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IN-KIND COSTS

Payment made in the form of goods and services, rather than cash. Think of "In-Kind Costs" as a type of donations.

EXAMPLES:

- Volunteer hours

- Materials

- Food & Beverages

- Facilities

- Volunteered Employee Time

Credit: Dance Place

MATCHING FUNDS

Matching Funds are funds from other sources that will help pay for the project. Types of other sources typically include additional grants or donations.

Credit: Anacostia Watershed Society

BUDGET NARRATIVE

> **Budget Narrative** explains and justifies **every** line item in the budget.

PERSONNEL EXAMPLE:

Total Salary Request: $10,000

➤ Susan Stormwater: **Request** $6,000 for 200 hours at $30 / hour.

➤ Walter Waters: **Request** $4,000 for 160 hours at $25/hour.
                                    Match: $4,000 for 160 hours at $25/hour.

Total Benefits Request: $1,500

➤ Benefits are 15% of total salary request. $10,000 x 0.15 = $1,500

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BUDGET NARRATIVE

Budget Narrative explains and justifies **every** line item in the budget.

TRAVEL EXAMPLES:

➢ **Total Travel Request: $150**

➢ Fuel: Travel to and from Make Believe Island from Blue Badgers, Inc. office.
Estimated 20 trips to the island, total of 200 miles (10 miles/trip).
200 miles x $0.54 = **$108**
Note: $0.54 is the standard mileage reimbursement rate

➢ Metro & Bus Fair: Estimated at **$42**

BUDGET NARRATIVE

Budget Narrative explains and justifies **every** line item in the budget.

CONTRACTOR EXAMPLES:

Total Contractor Request: $1,250

➤ Contractor 1: Graphic design artistic, Ryan Rain: $1,250 for 100 hours at $125 / hour.
Activities: Design litter prevention signs.

➤ Contractor 2: Matching funds of $2,000 to hire invasive plant removal expert.

BUDGET NARRATIVE

Budget Narrative explains and justifies **every** line item in the budget.

SUPPLIES EXAMPLES:

Total Supplies Request: $6,000

➢ Planting Supplies: **Request $5,500:** 20 native trees, 130 shrubs, and 20 TreeGuard watering systems at $19/guard.
In-Kind $500: Mulch valued at $30 / cubic feet donated by HomeDepot. See attached Letter of Support.

➢ Cleanup Supplies: **Requested $500:** Trash bags, recycling bags, and gloves.

KEY POINTS

o **Be realistic.** Do not overstate or understate.

o **Be thorough.** Any forgotten costs will cost you, literally.

o **Be accurate**. Don't make up figures – get real costs.

o **Be consistent.** Make sure your budget includes all activities listed in your project description and work plan.

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MORE KEY POINTS

- **Follow directions.** Refer back to the Request for Application (RFA). If you have questions, ask.

- **Report everything.** Cost out the total amount the project is going to cost, not just what you are asking from this one grant.

- **Double check!** Double check your math and make sure your budget total is accurate.

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Design, Engineering, Permitting

Project and Program Management

Training and Science
Communication

Engineering driven by ecological principles to revitalize the urban landscape, an interdisciplinary approach:
Civil Engineers, Landscape Architects, Urban Planners, Arborists, Ecologists, Educators, Coders, Graphic Designers

COMMUNITY STORMWATER SOLUTION

Prime **Inspector Green**

Mobile application, inspired by the Public's enthusiasm for Pokémon Go.

Novel student engagement tool with bioretention and associated maintenance issues through play.

Partner **RiverTools**

Maintenance training toolkit for RiverSmart Schools stewards.

A set of narrated PowerPoint presentations and an accompanying field manual to introduce schoolyard LID caretakers to stormwater fundamentals.

BUDGET

- Start with the **Outcomes**

- Work your way back through the **Milestones**

- Draw on existing **Expertise**

- Allocate resources for **Revisions**

- Consider the **small** things

- Integrate a **Contingency** factor

Sediment
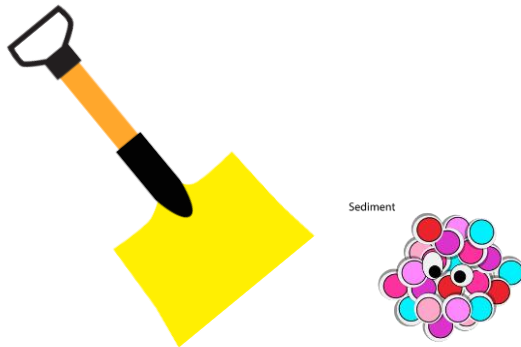
NARRATIVE

- Connect request to time and expertise

- Discuss indirect, match, contingency

WORKBOOK ACTIVITY 4: PART 1

DIRECTIONS:

1. Open you binder to the Grant Application Example 1: *Litter Letter Project*

2. Turn to page 6

3. Read the **Budget Table** and **Budget Narrative**

4. Identify the strengths and opportunities for improvements in the **Budget Table** and **Budget Narrative**

5. Record strengths and opportunities for improvements in Workbook Activity 3: Part 1

Credit: Krista Schlyer

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WORKBOOK ACTIVITY 4: PART 2

DIRECTIONS:

1. Create a draft **Budget Table** using the template provided

2. Practice writing a **Budget Narrative** from budget items listed in your budget table

	Budget Category	Requested Funds	Matching Funds	In-Kind Donations	Total
EXAMPLE:	*Personnel Costs:*				
Employee 1		$ -	$ -	$ -	$ -
Employee 2		$ -	$ -	$ -	$ -
Employee 3		$ -	$ -	$ -	$ -
Volunteer		$ -	$ -	$ -	$ -
Benefits (at ____%)		$ -	$ -	$ -	$ -
Indirect Costs (at ___%)		$ -	$ -	$ -	$ -
		$ -	$ -	$ -	$ -
		$ -	$ -	$ -	$ -
		$ -	$ -	$ -	$ -
	Direct Costs:				
Contractor *		$ -	$ -	$ -	$ -
Insurance		$ -	$ -	$ -	$ -
Travel		$ -	$ -	$ -	$ -
Equipment *		$ -	$ -	$ -	$ -
Materials & Supplies *		$ -	$ -	$ -	$ -
		$ -	$ -	$ -	$ -
		$ -	$ -	$ -	$ -
		$ -	$ -	$ -	$ -
*Each category gets its own budget line	**TOTAL:**	$ -	$ -	$ -	$ -

Credit: Krista Schlyer

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SCORING CRITERIA

Proposal Scoring

All proposals will be scored according to the criteria below.

Scoring Criteria	Points
Presents an achievable plan for executing the project	15
Presents a reasonable budget for the work proposed	15
Involves members of an identified community in the development and execution of the project as evidenced through letters of support	15
Uses art or another creative solution	5
Will lead to behavior change	5
Furthers existing DOEE efforts or stated priorities to reduce the impacts of stormwater runoff	10
Is cost effective (more bang for the buck)	10
Presents a meaningful way to educate the public on a stormwater-related issue	5
Will produce quantifiable outcomes	5
Demonstrates experience managing funds and reporting properly	5
Benefits the District's MS4 area, directly or indirectly	5
Benefits the Anacostia River or supports the "Year of the Anacostia"	5

FOUND IN RFA!

CRITERIA IS SPECIFIC TO EACH RFA.

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WHAT'S NEXT?

Stormwater 101 *September 18th*

Learn how stormwater impacts your neighborhood, rivers, and the Chesapeake Bay and opportunities to fund community projects. Includes a site tour of green infrastructure at THEARC.

Project Description & Partners *September 25th*

Join this workshop for the opportunity to work with community partners and learn how to write a strong project description. We will answer questions like *"What does a grant application look like?"* and *"What should be included in a project description?"*

Work Plan & Required Documents *October 2nd*

Ever wonder what is the difference between outputs and outcomes? Overwhelmed by the amount of additional documents required with a proposal? Join this workshop and learn how to write a strong work plan and an explanation of the required supporting documents.

Budget & Narrative *October 9th*

Budgeting not your strong suit? No worries! Join this workshop to learn the most critical aspects of a good budget and how to successfully write a budget narrative to explain how you will be spending the money.

You got the grant, now what? *October 16th*

Congratulations! You got the grant, but now what? Join this workshop and learn what happens after you are awarded a grant and what is required.

Questions? Contact Kara Pennino at *kara.pennino@dc.gov* or 202-654-6131

DEPARTMENT OF **ENERGY & ENVIRONMENT**

11th Street **BRIDGE PARK**

WE ARE GOVERNMENT OF THE DISTRICT OF COLUMBIA
DC MURIEL BOWSER, MAYOR