Standard OCB Grant: Budget Narrative Sample*

Organization: Connections for Aging with Independence
Program Name: OCB: Program Evaluation Improvements

Connections for Aging with Independence (CAI) requests $31,790 for organizational capacity building to enhance CAI's ability to learn from its programs, inform quality improvement efforts, and strengthen organizational sustainability. CAI will engage consultants and technical assistance providers to facilitate the planning and implementation of enhanced evaluation strategies. A database will be purchased to increase CAI's ability to effectively track and assess its senior services, providing data to inform the program evaluation strategies. Key staff within the organization will be directly involved in project oversight and coordination. Project expenses include the following items:

Direct Expenses:

Consultant Fees: Donohoe and Associates has been identified as the consultant of choice for this project. This consulting firm specializes in program evaluation for nonprofits. Marianne Donohoe, President, will provide her expertise to guide CAI on identification of program evaluation strategies within a framework of organizational learning.
- CAI has received a preliminary contract for the proposed scope of work and has included it with the grant proposal. It outlines the breakdown of hours, deliverables, and fees, totaling $17,500, all of which is being requested from RRF to engage the consultant.

TechToo has been identified as a technical assistance provider to offer additional expertise for the project. TechToo provides nonprofits with resources and guidance to help nonprofits make smart software decisions. CAI will engage TechToo to conduct an Information Technology assessment of the organization's technology needs, with a particular emphasis on the role technology can play in effective program evaluation. It will include recommendations for potential technology upgrades, such as appropriate options for a case management database. Once a database or technology upgrade is selected, TechToo will train CAI staff on its use.
- CAI has received a preliminary contract for the proposed scope of work, which we included with the grant proposal. It outlines the breakdown of hours, deliverables, and fees, totaling $6,000. CAI has secured funding from the Tri-Town Community Foundation for this expense.

Technology Expense: CAI is budgeting $8,000 for a case management database to be used as an essential part of the organization's program evaluation strategies. This tool will track demographic information about older adult clients, contacts between CAI staff and clients, the individualized service plans, and progress toward the plans. It will allow CAI to assess outcomes and report on all the information collected. CAI has pre-identified *Info to Impact* as a potential database, pending results from TechToo's assessment.
- An overview of *Info to Impact* is included with grant proposal, along with a price bid. CAI is asking RRF to contribute $8,000, which is the total cost of this technology expense.

Associate Director: Ten percent of the Associate Director's time will be allocated to this project. Mr. Rodgers will be responsible for overall project coordination and reporting. He will also serve as the main point-person for facilitating interactions with the project consultant, technical assistance provider, and CAI staff.

- Based on Mr. Rodgers annual salary, this portion of time equates to $6,000 total. CAI will contribute 5% of his salary in-kind; RRF is asked to cover the remaining 5% ($3,000).

Executive Director: Five percent of the Executive Director's time will be allocated to project oversight and involvement. Ms. Smith will also be responsible for interfacing with members of the Board of Directors around their involvement in the project.
- Based on Ms. Smith's annual salary, this portion of time equates to $5,000 total. None of this salary cost is requested from the Foundation. It will be contributed in-kind.

Board Retreat: CAI's Board of Directors will be actively engaged in this project, providing insight about the organization's strategic vision and program outcomes it wishes to achieve. Two half-day Board retreats will be held, one at the beginning of the project and one near its conclusion. The project consultant will facilitate these events (reflected in proposed scope of work).
- CAI is budgeting $175 for each retreat for food and meeting materials; $350 total. CAI will cover these costs through its Board Contribution Fund.

Staff Training: CAI's front-line staff will receive training in the new program evaluation strategies and how to use the new case management database. The project consultant and technical assistance provider will facilitate these trainings (as reflected in proposed scopes of work; training content outlined in proposal narrative). All 20 of CAI's front-line staff members will be trained as well as four key administrative staff members, for a total of 24 staff. Staff will be divided into small groups (12 individuals per group) to allow for effective learning. Both small groups will participate in two, two-hour training sessions (four training sessions total). The sessions will be held at an off-site training center, Learn with Us, which has conference rooms and computer labs that can accommodate hands-on training with the new technology.
- CAI has allocated $400 to pay rental fees for the training center ($100 per two-hour rental). The agency is asking RRF to cover this cost.

Indirect Expense: Per RRF guidelines, 10% is allocated for indirect costs such as rent, utilities, etc. This equates to $2,890 of the request to RRF.

Revenue: RRF is asked to cover consulting fees of Donohoe and Associates, the technology purchase, half of the Associate Director's time on the project, staff training expenses, and indirect costs, for a total of $31,790. CAI has secured $6,000 from the Tri-Town Community Foundation, to be used toward the engagement of TechToo. CAI will contribute the remaining $9,785 for all other expenses.

* This format is for illustrative purposes only. Use whatever format best reflects your project.