



Budget Narratives and Staffing Plans

Budgeting and Financial Planning

Learning Objectives

- Explain the function of a budget narrative in grant proposals
- Develop detailed staffing plans aligned with project goals
- Articulate how personnel and non-personnel costs support program outcomes
- Demonstrate alignment between budget figures and the project narrative

Role of the Budget Narrative

- Clarifies each line item
 - Explains “why” and “how” for each expense
- Demonstrates cost-effectiveness
 - Shows prudent use of funds
- Highlights sustainability
 - Reveals long-term financial planning
- Builds trust
 - Transparency fosters funder confidence

Elements of a Strong Budget Narrative

- Line-Item Explanations
 - Identify and describe each budget category
- Justification of Costs
 - Link each cost to program activities and outcomes
- Method of Calculation
 - Show the math (hourly rates, unit costs, etc.)
- Timeline for Expenses
 - Indicate when each cost will be incurred

Project Manager **\$288,000**

- Annual salary \$96,000
- 100% to project
- Total amount funded by 3-year grant \$288,000
- Purpose: Manage implementation of program goals, objectives and deliverables. Collaborate with partners. Report back at meetings on progress and for any support in troubleshooting issues. Complete all reporting requirements and monitor budget. Work closely with Development Director to achieve sustainability of project after the 3-year grant. Community engagement, promoting the project in the community and participating in events. Ensure quality control and evaluation of the program.

Development Director

- Annual salary **\$96,000**
- 80% to project
- Total amount funded by 3-year grant \$230,400
- Purpose: Develop and execute a comprehensive fundraising plan in collaboration with senior leadership to increase revenue and achieve program goals for sustaining this program beyond the 3-year grant. Work with the communications team to create fundraising materials and campaigns that communicate our mission and values to target audiences. Plan and execute all special events, including the trainings in this proposal. Manage grant writing and identification of new grant opportunities. Generate donor communications, newsletters, and annual report.

Legal Research Assistant

- Annual salary **\$4,000**
- 50% to project
- Total amount funded by 3-year grant \$7,344
- Purpose: Work under the guidance of Policy Advisor to conduct legal research and literature reviews. Organize and prepare teaching materials. Prepare and present on program legal topics at Summit.

Staffing Plan Overview

- Personnel Structure
 - Define roles
 - Program manager, coordinator, support staff
- Responsibilities & Deliverables
 - Align each role with project tasks
- Time Commitment
 - Indicate Full-Time Equivalent (FTE) or hours allocated
- Wages & Benefits
 - Break down salaries, hourly rates, and fringe benefits



Reflection Slide

Consider staffing plans you have written in previous grant applications

- How detailed have your staffing plans been in previous proposals, and what additional clarity might be helpful?
- Which roles are most essential to achieving your project's outcomes, and how can you illustrate that necessity in your staffing plan?

Writing a Convincing Staffing Rationale

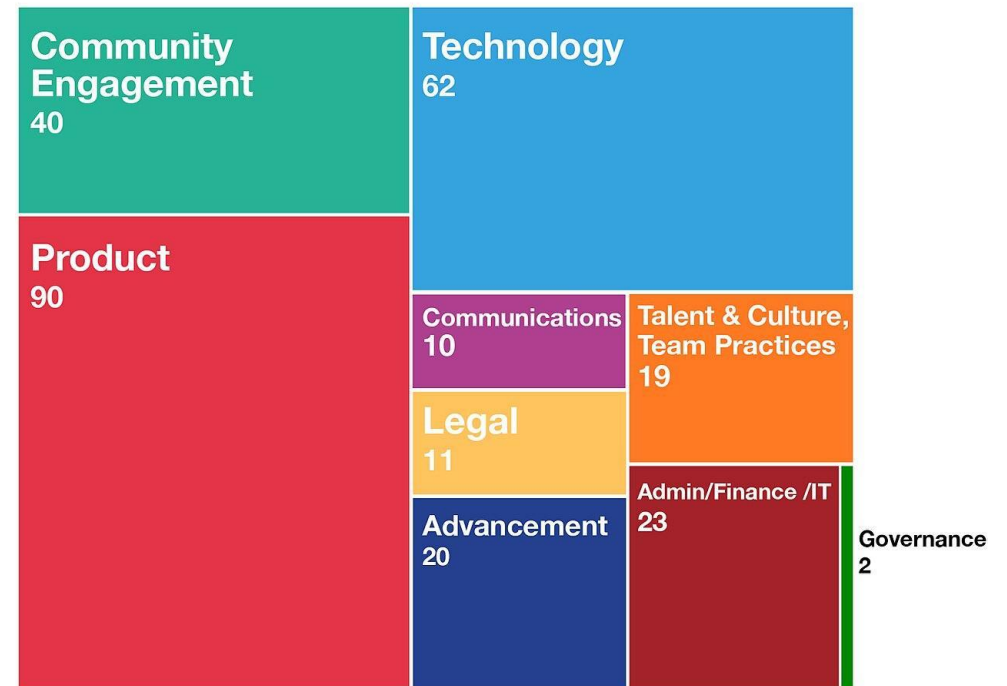
- Emphasize Expertise
 - Qualifications or unique skills needed
- Describe Impact
 - How each role directly influences outcomes
- Link to Program Goals
 - Show that staffing structure aligns with objectives
- Highlight Collaboration
 - Explain coordination among roles



Budget Narrative + Staffing Plan Integration

- Consistent Terminology
 - Use the same job titles in both documents
- Cross-Reference
 - Match line items with positions and narratives
- Highlight Percentages
 - Show how staff time translates into budgeted costs
- Avoid Redundancies
 - Ensure your narrative complements, not repeats, the budget table

Distribution of staff by department (277)



Common Pitfalls & Best Practices

- Pitfalls
 - Vague descriptions (“Training costs – \$5,000”)
 - Misalignment between budgeted hours and narrative claims
- Best Practices
 - Provide back-up documentation or estimates (quotes, salary benchmarks)
 - Address potential changes or contingencies

Putting It All Together

- Ensure your staffing plan and budget narrative complement the proposal's goals
- Show the clear rationale and calculation method
- Match job titles, salaries, and time allocations across documents
- Emphasize how staffing and budget allocations drive outcomes

Common Pitfalls & Best Practices

- A clear budget narrative and robust staffing plan make a stronger proposal
- Transparency and detail build funder confidence
- Review and refine your current narrative and staffing plan for clarity and consistency
- Multi-year financial planning, cash flow management, and more

Key Takeaways & Next Steps

- A clear budget narrative and robust staffing plan make a stronger proposal
- Transparency and detail build funder confidence
- Review and refine your current narrative and staffing plan for clarity and consistency
- Multi-year financial planning, cash flow management, and more