

					Leverage/Match to be Provided Leverage may include committed funds as well as resources, e.g. staff time or program space. Note that areas require leveraged resources: E, L, Q, R, S, T, U, V.
Subcategory (Reference Only)	Budget Line Item	Staff Last Name & Title of person assigned to project team	% of staff person budgeted to grant	Requested Budget Amount	
Personnel	Staff 1	Castellanos, Director of Small Business Services	40%	\$ 41,200.00	\$ -
Personnel	Staff 2	Yachuk, Program Manager	25%	\$ 19,375.00	\$ -
Personnel	Staff 3	Casey-Stevens, Program Manager	25%	\$ 18,669.00	\$ -
Personnel	Staff 4	Marquez Velloso, Program Manager	25%	\$ 18,669.00	\$ -
Personnel	Staff 5	Chang, Associate Director of Service Operations	10%	\$ 9,270.00	\$ -
Personnel	Staff 6	Zarlin, Chief Impact Officer	15%	\$ 18,000.00	\$ -
Personnel	Staff 7	Bindman, Chief Program Officer	5%	\$ 16,500.00	\$ -
Personnel	Staff 8	Wordeman, Bookkeeping and Finance Manager	80%	\$ 46,176.00	\$ -
Personnel	Staff 9	Fong, Client Success Associate	5%	\$ 2,829.00	\$ -
Personnel	Staff 10	Mungioli, Social Media Manager & Designer	5%	\$ 3,605.00	\$ -
Personnel	Staff 11	Call Center	80%	\$ 243,720.00	\$ -
Personnel	Staff 12			\$ -	\$ -
Personnel	Staff 13			\$ -	\$ -
Personnel	Staff 14			\$ -	\$ -
Personnel	Staff 15			\$ -	\$ -
Personnel	Staff 16			\$ -	\$ -
Personnel	Staff 17			\$ -	\$ -
Personnel	Staff 18			\$ -	\$ -
	Staff 19				
Personnel	Staff 20			\$ -	\$ -
	Total budgeted FTE (column E)		3.15	\$ 438,013	\$ -
Subcategory	Budget Line Item	Types of fringe included (eg FICA, SUI, Medical,	Total fringe %		
Personnel	Fringe benefits	FICA, SUI, Medical, Dental, Vision, 401K employer	20	\$ 38,858.00	\$ -
Staff Expenses	Staff Development			\$ 3,000.00	\$ -
Staff Expenses	Staff Travel			\$ 4,000.00	\$ -
		Total Personnel and Staff Expenses		\$ 483,871.00	\$ -
Operating Costs		Consultant/Contractor Name			
Subcategory	Budget Line Item				
Equipment	Lease and Maintenance			\$ -	\$ -
Equipment	Purchase (Computer/IT)			\$ -	\$ -
Equipment	Purchase (Furnishings)			\$ -	\$ -
Facilities	Occupancy Costs/Rent			\$ -	\$ -
Indirect/Fees	Indirect Costs			\$ 95,829.00	\$ -
Internal Control/Compliance	Accounting, Audit, and Payroll			\$ -	\$ -
Marketing	Marketing Costs				\$ -
Office Supplies	Office Supplies			\$ -	\$ -
Other	Consultant/Contractor 1	Bannigan McDade, Interim Finance		\$ 14,400.00	\$ -
Other	Consultant/Contractor 2	ABBC Services Inc., bookeeping and accounting		\$ 117,000.00	\$ -
Other	Consultant/Contractor 3	Isabelle Zhang, Chinese translation services		\$ 7,500.00	\$ -
Other	Consultant/Contractor 4			\$ -	\$ -
Other	Consultant/Contractor 5			\$ -	\$ -
Other	Consultant/Contractor 6			\$ -	\$ -
Other	Consultant/Contractor 7			\$ -	\$ -
Other	Consultant/Contractor 8			\$ -	\$ -
Other	Consultant/Contractor 9			\$ -	\$ -
Other	Participant/Job Seeker/Client Support costs			\$ -	\$ -
Other	Event Costs (Hosting)			\$ -	\$ -
Other	Fiscal Agent Fee			\$ -	\$ -
Other	Food/Meals			\$ -	\$ -
Other	HR costs			\$ -	\$ -
Other	Permit Costs			\$ -	\$ -
Program Supplies	Loan Program			\$ -	\$ -
Program Supplies	Mini-Grant Program				\$ -
Program Supplies	Project/Program Supplies			\$ 20,100.00	\$ -
Program Supplies	Stipends/Honoraria			\$ -	\$ -
Risk Mitigation/Insurance	Insurance Fees			\$ 11,250.00	\$ -
Utilities	Utilities			\$ -	\$ -
		Subtotal Operating and Program Expenses		\$ 266,079.00	\$ -
	Deliverable Number	Description			
Deliverables	Deliverable 2				\$ -
Deliverables	Deliverable 2				\$ -
Deliverables	Deliverable 3			\$ -	\$ -
Deliverables	Deliverable 4			\$ -	\$ -

Deliverables	Deliverable 5			\$ -	\$ -
Deliverables	Deliverable 6			\$ -	\$ -
Deliverables	Deliverable 7			\$ -	\$ -
Deliverables	Deliverable 8			\$ -	\$ -
Deliverables	Deliverable 9			\$ -	\$ -
Deliverables	Deliverable 10			\$ -	\$ -
Deliverables	Deliverable 11			\$ -	\$ -
Deliverables	Deliverable 12			\$ -	\$ -
Deliverables	Deliverable 13			\$ -	\$ -
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Deliverables	Deliverable 24			\$ -	\$ -
Deliverables	Deliverable 25			\$ -	\$ -
Deliverables	Deliverable 26			\$ -	\$ -
Deliverables	Deliverable 27			\$ -	\$ -
Deliverables	Deliverable 28			\$ -	\$ -
Deliverables	Deliverable 29			\$ -	\$ -
Deliverables	Deliverable 30			\$ -	\$ -
		Subtotal Deliverables		\$ -	\$ -
				Requested for Funding	Leverage/Match to be Provided
Total Budget Amount				\$ 749,950.00	\$ -

## Instructions for Completing the Budget template

- Reference individual Program Areas in section **II. Program Areas and Scope of Work** of RFP 219 for specific instructions/expectations.
- In the Budget template , enter costs into the appropriate line items for the proposed project.
- Reference to the Line Item Descriptions tab for explanation of line items including supporting documents that will likely need to be submitted with the monthly invoices post-grant execution.
- Calculation and line item cells have been locked.
- Some additional description cells (staff names, contractor names, and deliverable descriptions) are available for entry as indicated in light orange.
- No additional line items may be added.
- Contact [owd.procurement@sfgov.org](mailto:owd.procurement@sfgov.org) with questions or issues concerning this form.

Budget Line Item Title	Applicable Expenses (examples of currently used budget items and common expenses)	Supporting Documentation Examples (for monthly invoicing)
Salary	Cost of labor for agency staff by anticipated person/position	ADP Reports, paystubs, copies of payroll checks or direct deposit statements for all staff for which salaries are requested. Other staff on the same reports and their indentifying information should be redacted prior to submitting to OEWD.
Fringe Benefits	All fringe and benefit costs combined (FICA, SUI, medical, etc.) Does not include agency insurance costs (workers comp, liability, etc.)	none needed
Consultant/Contractor 1	Includes BOTH cost of professional services performed by vendor or professional staff not on payroll AND cost of technical services performed by subcontractors and subcontracting agencies. Common costs (depending on program) may be: curriculum development	Invoice from consultant/contractor
Consultant/Contractor 2	consultant; marketing firm; neighborhood business services assistant (including travel (lodging/accommodations) negotiated as part of those sub-contract or consultant agreements); attorney fees if necessary (need advance approval) ; architectural design services; SBDC contractors; translation services; invoice for fabrication of public art project; cleaning contracts; music/art exhibit/other programmers; website/video production; graphic design, publicist; graphic/editing support for event document production; fees for instructors/workshop leaders/youth coordinator/program intern not paid through	
Consultant/Contractor 3		
Consultant/Contractor 4		
Consultant/Contractor 5		
Consultant/Contractor 6		
Consultant/Contractor 7		
Consultant/Contractor 8		
Consultant/Contractor 9		
Consultant/Contractor 10		
Stipends/Honoraria	Stipends offered to speakers, volunteers, non-contracted musicians, artists, artisans, non-contracted interns, etc.	Invoices, receipts, or copies of checks and confirmation of receipt. May require additional memo from agency as to programmatic tie/services provided.
Equipment Lease & Maintenance	Ongoing equipment costs that may be internal to agency operations (copy machines; ongoing IT maintenance/support) or may be one time equipment lease costs for specific events (pressure washer rental, generator rental for a fair, etc.)	Invoices, receipts, or other proof of purchase. May require memo or additional explanation from agency as to programmatic tie/services provided if not obvious in scope.
Equipment Purchase (Furnishings)	Rarely used for IIN budgets. Furniture (desks, chairs, workstations, etc.) that are programmatically necessary and which the funded agency cannot leverage otherwise. All tangible property purchased with City grant funds may be recaptured and redistributed by the City. Grantees should carefully read appendix C of their grant agreement if anticipating purchasing tangible items with grant funds.	Invoices, receipts, or other proof of purchase. May require memo or additional explanation from agency as to programmatic tie/services provided if not obvious in scope.
Equipment Purchase (Computer/IT)	Rarely used for IIN budgets. Laptops, computers, and other technology related purchases that are programmatically necessary and which the funded agency cannot leverage otherwise. All tangible property purchased with City grant funds may be recaptured and redistributed by the City. Grantees should carefully read appendix C of their grant agreement if anticipating purchasing tangible items with grant funds.	Invoices, receipts, or other proof of purchase. May require memo or additional explanation from agency as to programmatic tie/services provided if not obvious in scope.
Insurance Fees	Required insurance policy maintenance costs (commercial general liability, auto, workers comp, etc.); and event insurance	Invoices, receipts, or other proof of purchase.
Staff Travel	Mileage, vehicle rental, tolls, gas, parking fees, air travel, and ground transportation if staff	purchase. May require memo or
Occupancy Costs	Cost associated with building space, rental/lease of space used to run a program; includes	purchase.
Utilities	PG&E, water bill, etc.; cost of telephone, fax, internet; use of cell phones as a required	purchase.
Project/Program Supplies	Programming supplies and materials, mosaic supplies, homeless outreach incentives (socks,	purchase.
Marketing Costs	Materials & advertising costs specific to marketing including: program promotion, advertising,	purchase.
Event Costs (Hosting)	Cost of hosting events, meetings, trainings, conferences including: materials to be used at	purchase.
Permit Costs	Building permit, event permits, DPH sidewalk landscape permit fee; sound permit,	purchase.
Food/Meals	General Fund only; programmatically necessary; food for program activities not given directly	confirmation of receipt. May require
Office Supplies	Materials for general office use, including: postage, paper, pens, etc. May have some of the	purchase.
Accounting, Auditing, and Payroll Fees	Cost of processing payroll and staff compensation (monthly ADP or Paychex fees, etc.); audit	Invoices or receipts for items
HR costs	Staff recruitment costs (job ads, printed announcements, background checks, drug screening,	Invoices or receipts for items
Staff Development	Cost of attending trainings, registration fees, associations, books, or webinars associated with	purchase.
Mini-grant Program	Only used if OEWD authorizes it for your program. Pre-approval required; mini-grant	source documentation
Loan Program	Only used if OEWD authorizes it for your program. Pre-approval required; loans funded to	source documentation
Fiscal Agent Fee	Flat, agreed-upon rate negotiated between OEWD and a fiscal agent to administer a	none needed
Indirect Costs	Items in the organization's budget that are shared and unable to be directly allocated --	calculation if over 15% of direct costs
Deliverable 1	All project deliverables -- Project/Program Managers (PMs) have the flexibility to negotiate up to 30 discrete deliverables per budget.  Note: Budgets may be all deliverable based, all cost-reimbursement based, or a combination of the two. For costs that were estimated and included as part of a deliverable payment, no additional direct or indirect costs should be budgeted. For example, if a specific report is negotiated as a deliverable payment, all staff time, office supplies, printing costs, distribution costs, rent/space costs, etc should be included within that single deliverable line item.	Written confirmation from OEWD PM that the item submitted meets the criteria negotiated and documented in the scope. Each deliverables should be negotiated, produced, confirmed and invoiced separately. Note: unlike cost-reimbursement items which have a documented purchase date, deliverables are considered "purchased" by OEWD when reviewed and accepted by assigned staff. In order for deliverables to be reimbursed, they must be both produced within the grant/contract term <b>and</b> accepted by OEWD within the grant/contract term.
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