

## BUDGET CHECKLIST

This document provides guidance as to which budget category aligns most appropriately with each budget line item. If you have specific questions please contact your Rooted in Relationships Coordinator. You should also refer to the Budget and Reporting section of the Process Guide on the Rooted in Relationships Website (specifically the Budget Justification document) for more specific information about appropriate expenses for each budget category.

The current Budget Form and Budget Justification can be found [here](#) - please ensure that you are using the correct forms.

Correct Budget Forms Used?  YES  NO

### Coordination and Fiscal Management

BUDGET LINE	APPROPRIATE GRANT BUDGET CATEGORY	BUDGET JUSTIFICATION
Coordinator Cost	Wages and/or Contract/Consulting	
Fiscal Management Cost	Wages and/or Contract/Consulting	
Fringe for Coordinator	Benefits and Payroll Taxes	
Fringe for Fiscal Management	Benefits and Payroll Taxes	
Phone/Internet/Rent	Office Operation Expenses	
Meeting Facilitation	Contract/Consulting	
Office Supplies	Supplies	
Administrative Expenses	Administrative Expenses	
Stakeholder Meeting Expenses	Travel and/or Training and Outreach	

### Pyramid Model Implementation

BUDGET LINE	APPROPRIATE GRANT BUDGET CATEGORY	BUDGET JUSTIFICATION
<b>Coach and Trainer Time for Trainings</b> <ul style="list-style-type: none"> <li>· Yr1: 4 trainings plus ½-day Director Training</li> <li>· Yr2: 3 trainings</li> <li>· Yr3: 2 trainings <i>(contracted with UNL Extension)</i></li> </ul>	Training and Outreach	
<b>Provider and Director Stipends for Training</b> <ul style="list-style-type: none"> <li>· Yr1: 4 trainings plus ½-day Director Training</li> <li>· Yr2: 3 trainings</li> <li>· Yr3: 2 trainings</li> </ul>	Training and Outreach	

BUDGET LINE	APPROPRIATE GRANT BUDGET CATEGORY	BUDGET JUSTIFICATION
<b>Coaching Costs</b> <ul style="list-style-type: none"> <li>· Yr1:2.5hrs/month</li> <li>· Yr 2: 1.5hrs/month</li> <li>· Yr3: Individualized (min. of 6 hrs/max. of 12 hrs)</li> </ul> <i>Note: The time above can include prep for coaching but does not include any community coach team meetings.</i>	Contract/Consulting	
Coaching Stipends to Providers	Contract/Consulting	
Mileage for Coaches	Travel	
Lead Coach Time	Contract/Consulting	
Materials for Training and Provider Collaboration Meetings	Supplies	
Food for Meetings and Training	Training and Outreach	
Provider Collaboration Meetings (Coach Time and/or Provider Stipends) - Minimum of 6 per year	Contract/Consulting	
<b>Coach Professional Development</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> National Training Institute Registration \$400/person (Communities must send at least 2 coaches/alternatives)</li> <li><input type="checkbox"/> Coach Reflective Consultation (1 hr/month/coach)</li> <li><input type="checkbox"/> Attend PD offerings such as Coach Booster Sessions</li> </ul>	Training and Outreach	
<b>National Training Institute</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> Meals, Lodging, Airfare (Approx. \$1,500 per person)</li> </ul>	Travel	
Copies/Postage/Supplies	Supplies	
Provider/Coach Informational Meeting (if expanding)	Training and Outreach	

## ECMH Systems Work

\*\*Will be variable depending on the system(s) and strategies chosen\*\*  
 \*\*Budget should reflect the work outlined in the community work plan\*\*

BUDGET LINE	APPROPRIATE GRANT BUDGET CATEGORY	BUDGET JUSTIFICATION
Coordination Costs	Wages and/or Contract/Consulting	
Supplies	Supplies	
Example: Parent Engagement Opportunities	**Training and Outreach	

## In-Kind Contributions

Must be 20% of total budget—items below are ideas but not all will be included and there may be others in a community budget that are not listed here.

BUDGET LINE	APPROPRIATE GRANT BUDGET CATEGORY	BUDGET JUSTIFICATION
<b>Stakeholder Group Volunteers</b> · Calculated at current federal volunteer rate	Wages	
Coordinator/Fiscal Management Time	Wages	
Coordinator/Fiscal Management Benefits	Benefits and Payroll Taxes	
Office Space	Office Operations Expenses	
Meeting Space	Training and Outreach	
Equipment Costs (Copier, etc.)	Office Operations Expenses	
IT Support and Equipment	Wages and/or Contracts/Consulting	
Supplementary Grant Funds	--variable depending on funds--	
Program Supplies	Supplies	

**Other Considerations (not required, but other communities have found helpful)**

BUDGET LINE	APPROPRIATE GRANT BUDGET CATEGORY	BUDGET JUSTIFICATION
<b>Coach Professional Development</b> · Monthly Coach Meeting	Contract/Consulting	
<b>Coaching Costs</b> · Meeting time/coaching time with <b>Directors</b> (suggested 1/2hr to 1 hr. per month)	Contract/Consulting	
<b>Coaching Time</b> · Additional Planning/Preptime for coaches	Contract/Consulting	
<b>Year 4 Supports</b> · Please refer to document in Year 4 doc found <a href="#">HERE</a> for ideas/suggestions	Contract/Consulting or Training	
<b>Coaching Time for Travel</b> · Travel time for coaches (to reach providers who live in other communities)	Contract/Consulting	
<b>Training Make-Up</b> · Cost to purchase E-Modules from the Pyramid Model Consortium	Training and Outreach	
Completion Bonus	Other Expenses	

Go through each category on the Budget Form and Budget Justification to ensure that all items are filled out correctly and totals match

Budget Item	Budget Forms Filled Out Correctly?	Budget Form and Budget Justification Totals Match?
Wages		
Benefits & Payroll Taxes		
Office Operation Expenses		
Travel		
Equipment		
Supplies		
Training & Outreach		
Contract / Consulting		
Other Expenses		
Administrative Expenses		

Notes