On the → T.R.A.I.L. to Diabetes Prevention

Budget Development

Welcome!

2021-2022

On the T.R.A.I.L.
(Together Raising Awareness for Indian Life)
to Diabetes Prevention Program

Webinar Information

- Partner information
- New award/budgeting information
- Creating a Budget
- Uploading Documents
- Helpful Tips

National Partners

U.S. HHS

IHS

NCAI

BGCA

FirstPic, Inc.

Key Staff

Christian Weaver, Vice President of Development

Courtney Chavis, Grants Manager

Meaza Abegaz, Associate Director of Finance

Training & Technical Assistance Provider

Robin Paterson, Project Manager (Finance/Compliance/Program)

Matt Bieler, Sr. Project Coordinator (Finance)

Katelyn Marshall, Project Coordinator (Finance)

Thomas Paterson, Project Assistant (Finance)

Paul Leisawitz, Project Assistant (Finance)

Training &
Technical Assistance Provider

David Cook, Project Manager (Program)

Chris Clemens, Project Coordinator (Program)

Marie Paterson, Project Coordinator (Program)

Colleen Keating, Project Coordinator (Program)

Important Budgeting Information

2021-2022
T.R.A.I.L.
Creating and Entering the Budget into the Online Reporting Site

Budget Due Date

Proposed budgets are due in the online reporting site by
COB Monday August, 9.

National Congress of American Indians Fund

Username

Password

Log In

☐ Remember me

Forgot Your Password?

FirstPic employee? Log In

HELLO EXAMPLE PERSON.

Incomplete Sub-Grants

Sub-Grant Name	Status	Last Modified
NCAI-00-000-AA-ZZ		3/16/2018 7:46 AM

Incomplete Reimbursements

No Reimbursements Found

Incomplete Progress Reports

Report Name	Site	Status	Submitted Date
ETS Q2 Progress Report	Example TRAIL Site	Not Started	

Incomplete PA Logs

Report Title	Site	Month	Year	Status
January 2018 PA Logs	Example TRAIL Site	January	2018	Not Started

TRAIL
BGC of Example Land

Sub-Grants

HELLO EXAMPLE PERSON.

Incomplete Sub-Grants

Sub-Grant Name	Status	Last Modified
NCAI-00-000-AA-ZZ		3/16/2018 7:46 AM

Incomplete Reimbursemen

No Reimbursements Found

Incomplete Progress Reports

Report Name	Site	Status	Submitted Date
ETS Q2 Progress Report	Example TRAIL Site	Not Started	

Incomplete PA Logs

Report Title	Site	Month	Year	Status
January 2018 PA Logs	Example TRAIL Site	January	2018	Not Started

To enter a budget, select "Sub-grants" from the Grants dropdown.

SUB-GRANTS

Grant: [NCAI-00-000-AA-ZZ ▾]   Sub-Grant Name: [   ]

Status: [View All ▾]   Sort By: [Name ▾]   **Update**

View All   **Export Results**

Sub-Grant Name	Awarded	Total Budgeted	Requested Amount	Approved Amount	Balance	Status
NCAI-00-000-AA-ZZ	$18,000.00	$0.00	$0.00	$0.00	$18,000.00	

1 - 1 of 1   «   ‹   ›   »

Click on the sub-grant related to the budget you are creating. The Sub-Grant Name for the 2021-22 program year will start with **NCAI-21**.

Dashboard   About   Grants ▾   Reimbursements   Program ▾   Help   Logout

NCAI-00-000-AA-ZZ

TOTAL AWARDED: $18,000.00

Update Budget

Click "Update Budget" to begin the budget submission process.

| Organization: | BGC of Example Land | Date Range: | 09/01/20 | | Status: | |

| Total Budgeted: | $0.00 | Requested Amount: | $0 | | Balance: | $0.00 |

Personnel

Title	Hourly/Salary	Rate/Salary	Wks on Grant	% on Grant	Amount Allocated	Requested Amount	Approved Amount	Balance	Notes

Fringe Benefits

Personnel & Fringe Notes

Reviewer Notes:
No Notes from National

Total Personnel and Fringe Budget: $ 0.00

Expenses

Expense Notes

NCAI-00-000-AA-ZZ

TOTAL AWARDED: $18,000.00

Personnel

Mark Inactive   Delete

Title	Hourly/Salary	Rate/Salary	Total Hrs/Wk	Grant Hrs/Wk	Wks on Grant	% on Grant	Amount Allocated	Notes

Fringe Benefits

Update Amounts

Add Personnel

Delete

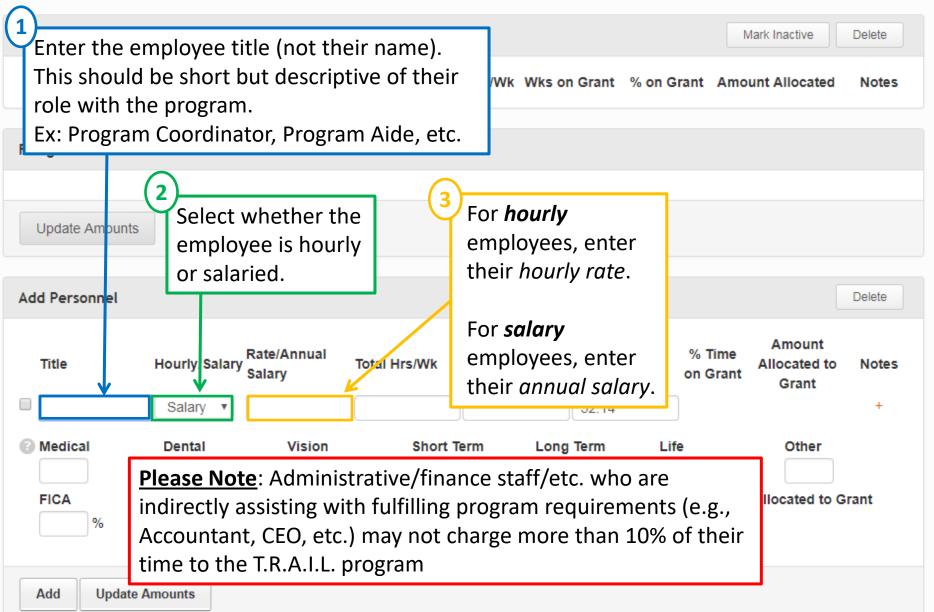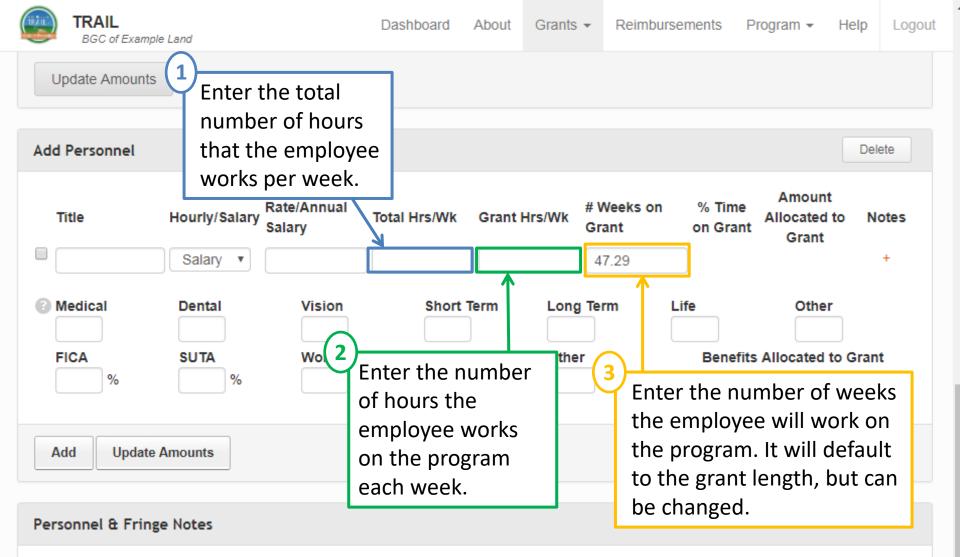To add a new staff line item, click the "Add" button in the "Add Personnel" box.

Add   Update Amo

Personnel & Fringe Notes

Reviewer Notes:

NCAI-00-000-AA-ZZ   TOTAL AWARDED: $18,000.00

1 Enter the employee title (not their name).
This should be short but descriptive of their role with the program.
Ex: Program Coordinator, Program Aide, etc.

Mark Inactive   Delete

/Wk   Wks on Grant   % on Grant   Amount Allocated   Notes

Update Amounts

2 Select whether the employee is hourly or salaried.

3 For *hourly* employees, enter their *hourly rate*.

For *salary* employees, enter their *annual salary*.

Add Personnel   Delete

Title   Hourly Salary   Rate/Annual Salary   Total Hrs/Wk   % Time on Grant   Amount Allocated to Grant   Notes

☐ [   ]   Salary ▾   [   ]   [   ]   [   ]   +

❓ Medical   Dental   Vision   Short Term   Long Term   Life   Other

FICA

Please Note: Administrative/finance staff/etc. who are indirectly assisting with fulfilling program requirements (e.g., Accountant, CEO, etc.) may not charge more than 10% of their time to the T.R.A.I.L. program

llocated to Grant

%

Add   Update Amounts

Update Amounts

① Enter the total number of hours that the employee works per week.

Add Personnel   Delete

Title	Hourly/Salary	Rate/Annual Salary	Total Hrs/Wk	Grant Hrs/Wk	# Weeks on Grant	% Time on Grant	Amount Allocated to Grant	Notes
☐	Salary ▾				47.29			+

Medical	Dental	Vision	Short Term	Long Term	Life	Other

FICA	SUTA	Wo...	...ther	Benefits Allocated to Grant
%	%			

② Enter the number of hours the employee works on the program each week.

③ Enter the number of weeks the employee will work on the program. It will default to the grant length, but can be changed.

Add   Update Amounts

Personnel & Fringe Notes

Please Note: Not all employees will be working on the program for the entire grant year. Therefore, when adding a new employee, the "# Weeks on Grant" should accurately reflect what is appropriate for each staff member.

Reviewer Notes:
No Notes from National

Update Amounts

Add   Delete

T   Time   Amount   Notes
                                       Grant   Allocated to
                                                  Grant
☐   +

? M   Other

F

A

Click on the + under Notes to add the narrative information for each staff member. These notes are for both the personnel and fringe benefits entries. Notes included for each line item should briefly describe the work the employee will be doing related to the T.R.A.I.L. program as well as any other relevant/clarifying information that may be needed.

Please note: If entering an amount for "Other" in the fringe benefits section, you need to provide information specifically identifying this fringe benefit.
In addition, if including any insurance fringe expenses, you will need to clarify that the amount reflected is for the employee only premium rate.
Notes are required for all line items.

Personnel & Fringe Notes

Supporting documentation verifying fringe rate(s) must be uploaded to the budget for percentage based fringe, with the exception of FICA.
(ex: Worker's Compensation, SUTA, retirement, etc.)

Reviewer Notes:
No Notes from National

When adding notes, this is the pop up that will appear. Please enter the necessary narrative information and press "Save and Close" to close the screen and return to the budget entry page.

Update Amounts

Add Personnel

Delete

Title	Hourly/Salary	Rate/Annual Salary	Total Hrs/Wk	Grant Hrs/Wk	# Weeks on Grant	% Time on Grant	Amount Allocated to Grant	Notes
☑	Salary ▾				47.29			+

? Medical

Dental

Other

FICA

%

SUTA

efits Allocated to Grant

Do not leave any empty items in the Add box. The system will try to save it for you and it will show up as an line item with a random string of numbers and letters as its title in your budget. Select these empty line items in the Add box and hit delete **before** saving or moving forward.

Add   Update Amounts

Personnel & Fringe Notes

Reviewer Notes:
No Notes from National

| | 7.65 % $49.53 | % | % | % | % | $49.53 |

| Title | ❓ Medical | Dental | Vision | Short Term | Long Term | Life | Other |
| Program Coordinator | | | | | | | |

| FICA | SUTA | Workers Comp | Retirement | Other | Benefits Allocated to Grant |
| | | | 17.68 | 0.20 % $17.68 | $746.98 |

Please indicate here the **number of youth**, as well as the **number of sites** within your organization you are planning to serve with this award.

If you are budgeting for something different than what was included in your award letter (# of youth, # of sites, and/or award amount), you will need to include detailed information here justifying the proposed changes.

Delete

Personnel & Fringe Notes

Reviewer Notes:
No Notes from National

Update Amounts   Save   Next

Total Personnel and Fringe Budget: $ 11,862.61
Total Expense Budget: $ 6,137.39
Total Budget Amount: $ 18,000.00

| | 7.65 % $49.53 | | % | | % | | % | | % | | $49.53 |

Title
Program
Coordinator

? Medical	Dental	Vision	Short Term	Long Term	Life	Other

FICA	SUTA	Workers Comp	Retirement	Other	Benefits Allocated to Grant
7.65 %	0.20 % $17.68	0.20 % $17.68	0.20 % $17.68	0.20 % $17.68	$746.98
$676.26					

Update Amounts

Add Personnel   Delete

Add   **Update Amounts**

Notes from reviewers will appear here. These might include
revisions needed if the budget is sent back for adjustment or
corrections.
During your original budget entry, this will be blank.

Personnel & Fringe Notes

Reviewer Notes:
No Notes from National

Update Amounts   **Save**   **Next**

Total Personnel and Fringe Budget: $ 11,862.61
Total Expense Budget: $ 6,137.39
Total Budget Amount: $ 18,000.00

Program
Coordinator

	FICA		SUTA		Workers Comp		Retirement		Other		Benefits Allocated to (
	7.65(%	$676.26	0.40(%	$35.36	0.20(%	$17.68	%		%		$729.30

Update Amounts

Click here if you need to add another staff person to your budget and repeat the previous steps.

Add Personnel

Add   **Update Amounts**

Personnel & Fringe Notes

If you need to step away from entering your budget, you may press "Save" and come back to continue later.

Reviewer Notes:
No Notes from National

Once you have entered all of the necessary Personnel and Fringe Benefits expenses, press "Next" to move on to the Expenses section of the budget.

Update Amounts   Save   Next

et:

Total Expense Bud

Total Budget Amount: $

Personnel

- Include a minimum of 1 Part-time (PT) position for the T.R.A.I.L. Program Coordinator;

- Any contracted person *regularly* involved with the T.R.A.I.L. program (e.g., Program Coordinator)

Personnel

- **Optional:** additional PT assistants and/or youth leaders;

- **Optional:** up to 10% for administrative/finance staff/other staff who indirectly assist with fulfilling program requirements (e.g., executive director, accountant, kitchen staff preparing healthy snacks, etc.);

Keep in mind that not all employees will be charging time to the grant for the entire grant year so number of weeks on program may vary for each staff member.

Personnel

Position Titles

- Titles should be short but descriptive
- Titles need to be position specific
    - Program Coordinator – Southside Branch
    - Program Coordinator – East End Unit
    - Program Aid #1
    - Program Aid #2

If you are a returning Club, you may refer to how entries are titled on your current budget for further examples.

Fringe Benefits

- You are not required to include fringe benefits in your budget, you may choose to include whatever makes the most sense for your Club.

- Fringe benefits should not be included if the position is filled by a contracted employee and not a regular employee.

- Insurance rates need to be based on employee only premium rates.

Fringe Benefits

- Health benefits need to be broken out into their own listings (i.e., Medical, Dental, Vision, etc.).

- Only fringe specifically listed in the budget may be claimed for reimbursement.

- An option for 'Other' is available if budgeting for a benefit that is not listed. This will need identified in the line item notes for this staff member in the personnel section.

Budget Notes

- The "Notes" section for each line item is where you will enter the budget narrative information.

- Detailed and/or clarifying information in regard to items listed in your budget will be provided here.

- Narrative information needs to be included in the "Notes" section specific to each line item.

Budget Notes – Personnel/Fringe

- Include a brief description of the responsibilities and duties of each position in relationship to fulfilling the program goals and objectives.

- **Example Notes**:
  - Program Coordinator will be responsible for running the program, tracking youth, and completing required reporting.
  - CPO will fulfill administrative components of the program from the beginning of the LOA and will oversee that all program requirements are being fulfilled.

Budget Notes – Personnel/Fringe

- Clarifications that may be needed - such as if the CEO is also functioning as the T.R.A.I.L. Program Coordinator.

- Verify that all insurance rates are based on employee only premium costs.

- **Example Notes**:
  - Health and Dental insurance are based on employee only premium rates.

NCAI-00-000-AA-ZZ

TOTAL AWARDED: $18

Mark Inactive

This is the Expenses page. As with Personnel, you add items and include line item notes. To begin, click "Add Expense"

Item	Category	Rate	Quantity	Amount Allocated to Grant

[Add Expense]   [Add Mileage]   [Update Amounts]

Expense Notes

Reviewer Notes:
No Notes from National

Attachments

No Attachments Found

Add Expenses

Delete

Item	Category	Rate	Quantity	Amount Allocated to Grant	Notes
	Other Costs ▾		1.00		+

Add Expense   Add Mileage   Update Amounts

① Enter the Item name.
Please use a **short** general descriptive name here.
Additional detailed information will be provided in the Notes.
Ex: Physical Activity Supplies; Healthy Foods; Program/Office Supplies; etc.

② Select the Item type:
• Equipment
• Supplies
• Travel
• Contract Specialist
• Other Costs

Attachments

Upload Attachment

Previous   Update Amounts   Save   Review and Submit

Total Personnel and Fringe Budget: $ 11,458.50
Total Expense Budget: $ 6,137.39
Total Budget Amount: $ 17,595.89

Add Expenses   Delete

Item	Category	Rate	Quantity	Amount Allocated to Grant	Notes
☐	Other Costs ▾		1.00		+

Add Expense   **Add Mileage**   **Update Amounts**

1 Enter the rate ($) per unit. For entries such as "Program/Office Supplies" this will be a lump sum as opposed to a per item amount.

No Notes from National

2 Enter the quantity purchased. Or in the case of a lump sum this will be 1. You may also enter a decimal if the cost of the item you are purchasing will be pro-rated to the program (*it is not required that you pro-rate*). (e.g., .75 = 75% charged to the grant – explanation will be needed in the notes)

Attachments

3 Add notes to explain the item(s) and how it will be used for/related to the T.R.A.I.L. program. In the case of a more general line item entry, examples of what you plan to purchase is also needed.
Notes are required for all line items.

Upload Attachment

Previous   Update Amounts   Save   Review and Submit

Total Personnel and Fringe Budget: $ 11,458.50
Total Expense Budget: $ 6,137.39
Total Budget Amount: $ 17,595.89

NCAI-00-000-EX-ZZ

TOTAL AWARDED: $18,000.00

Expenses
Mark Inactive   Delete

Contract Specialist

Item		...ted to Grant	Notes
☐	Healthy Cooking D...	00	+
☐	Physical Fitness/Sp...	00	+

Notes for Healthy Cooking Demonstration

Reviewer Notes:
No Notes from National

Close   Save

Equipment

Item		...ted to Grant	Notes
☐	Laptop Computer	00	+

Other Costs

Item	Rate	Quantity	...ted to Grant	Notes
☐	Bowling	8.00	25.00	$200.00	+
☐	Skating				+
☐	Swimmi...				+

When adding notes, this is the pop up that will appear. Please enter any necessary notes and press "Save" to close the screen and return to the budget entry page.

Supplies

Item	Rate	Quantity	Amount Allocated to Grant	Notes

NCAI-00-0001-XX

TOTAL AWARDED: $18,000.00

Rate = Per Hour or Per Session Fee
Quantity = Number of hours or sessions
Clarification for what each represents needs to be included in the notes.

Expenses

[Mark Inactive]

Contract Specialist

Item	Rate	Quantity	Amount Allocated to Grant	Notes
Healthy Cooking Demonstration	30.00	5.00	$150.00	💬
Physical Fitness/Sports Instruction	50.00	5.00	$250.00	💬

Equipment

Item	Rate	Quantity	Amount Allocated to Grant	Notes
Laptop	750.00	1.00	$750.00	💬

Other Costs

Rate = Per Person Fee
Quantity = Number of people

Item	Rate	Quantity	Amount Allocated to Grant	Notes
Bowling - Admission Fee/Shoe Rental	10.00	25.00	$250.00	💬
Skating - Admission Fee	10.00	25.00	$250.00	💬
Swimming - Admission Fee	250.00	1.00		💬

Rate = Group rate fee
Quantity = 1

Add Expenses

Delete

☑ Item	Category	Rate	Quantity	Amount Allocated to Grant	Notes
	Other Costs ▾		1.00		+

Add Expense   Add Mileage   Upd

Expense Notes

Do not leave any empty items in the Add box. The system will try to save it for you and it will show up as an line item with a random string of numbers and letters as its title in your budget.
Select these empty line items in the Add box and hit delete **before** saving or moving forward.

Reviewer Notes:
No Notes from National

Attachments

Upload Attachment

Previous   Update Amounts   Save   Review and Submit

Total Personnel and Fringe Budget: $ 11,458.50
Total Expense Budget: $ 6,337.39
Total Budget Amount: $ 17,795.89

Add Expenses

Delete

	Item	Category	Rate	Quantity	Amount Allocated to Grant	Notes
☐	Zumba Instructor	Contract Specialist ▾	20.00	10.00	$200.00	+

Add Expense   Add Mileage   Update Amounts

Expense Notes

Click "Update Amounts" to calculate the amount allocated to the grant.

Reviewer Notes:
No Notes from National

Attachments

Upload Attachment

Previous   Update Amounts   Save   **Review and Submit**

Total Personnel and Fringe Budget: $ 11,458.50
Total Expense Budget: $ 6,137.39
Total Budget Amount: $ 17,595.89

NCAI-00-000-EX-ZZ

TOTAL AWARDED: $18,000.00

Expenses   [Mark Inactive] [Delete]

Equipment

	Item	Rate	Quantity	Amount Allocated to Grant	Notes
☐	Laptop Computer	700.00	0.85	$595.00	+

After clicking "Update Amounts" the online reporting site organizes the items entered per category

Supplies

	Item	Rate	Quantity	Amount Allocated to Grant	Notes
☐	Digital Camera	125.00	1.00	$125.00	+
☐	Healthy Foods	1,300.00	1.00	$1,300.00	+
☐	Printer	150.00	1.00	$150.00	+

[Update Amounts]

Add Expenses   [Delete]

Item	Category	Rate	Quantity	Amount Allocated to Grant	Notes

[Add Expense] [Add Mileage] [Update Amounts]

Add Expenses   Delete

Item	Category	Rate	Quantity	Amount Allocated to Grant	Notes

Add Expense   Add Mileage   Update Amounts

Expense Notes

Click "Add Expense" to add a new expense item. Mileage is a special type of expense and must be added by clicking "Add Mileage."

The current reimbursable mileage rate is $0.56/mile. This should be entered for mileage unless your Club has a policy of reimbursing at a lower rate. If this is the case, please explain so in the notes for the "Mileage" line item.

The purpose and destination of travel needs to also be included in the Notes section.

Remember, only travel by personally owned vehicle should be entered in the budget via the Add Mileage option.

Reviewer Notes:
No Notes from National

Attachments

.

Upload Attachment

Previous   Update Amounts   Save   Review and Submit

Total Personnel and Fringe Budget: $ 11,458.50
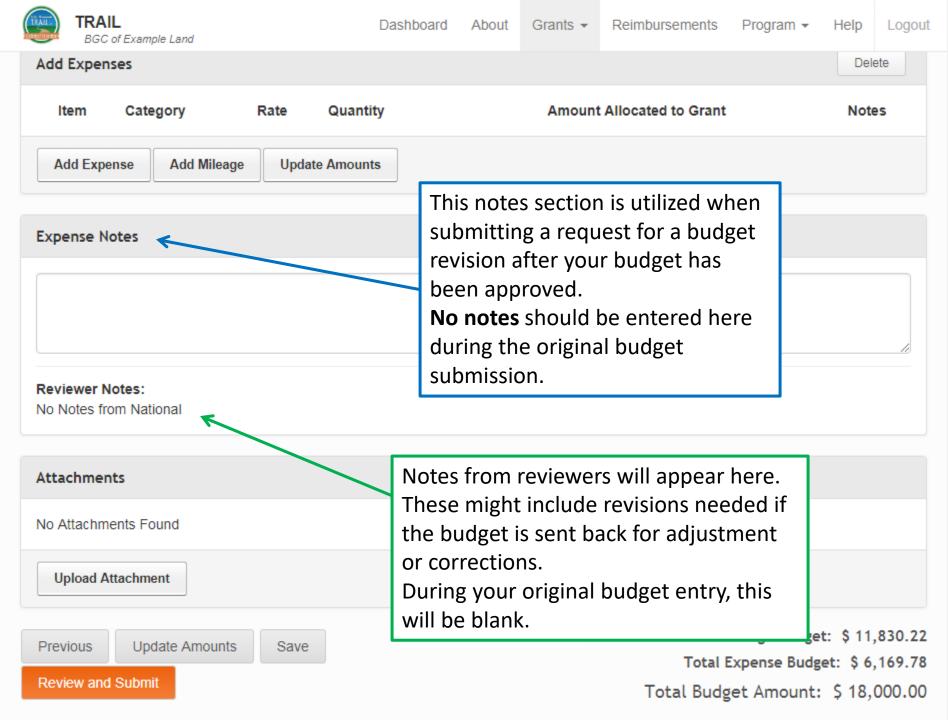Total Expense Budget: $ 6,137.39
Total Budget Amount: $ 17,595.89

Update Amounts

(1) Travel added via Club vehicle

The purpose and destination of the travel needs to be included in the line item notes, along with the total number of trips and R/T mileage estimate.

Add Expenses   **Delete**

	Item	Category	Rate	Quantity	Amount Allocated to Grant	Notes
☐	Travel to purchase sup|	Travel ▾	250.00	1.00		+
☐	Mileage	Travel	.545	375		+

Add Expense   **Add Mileage**   **Update Amounts**

(2) Travel via personal vehicle

The purpose and destination of the travel needs to be included in the line item notes. All travel by personnel vehicle needs to be included in this one line item, with different purposes/subtotals broken out in the notes.

Please Note: If using a mileage rate lower than the GSA allowable rate, a comment explaining this must be included.

Expense

Reviewer Notes:
No Notes from National

Add Expenses

Delete

Item	Category	Rate	Quantity	Amount Allocated to Grant	Notes

Add Expense   Add Mileage   Update Amounts

Expense Notes

This notes section is utilized when submitting a request for a budget revision after your budget has been approved.
No notes should be entered here during the original budget submission.

Reviewer Notes:
No Notes from National

Attachments

Notes from reviewers will appear here. These might include revisions needed if the budget is sent back for adjustment or corrections.
During your original budget entry, this will be blank.

No Attachments Found

Upload Attachment

Previous   Update Amounts   Save

Review and Submit

get: $ 11,830.22
Total Expense Budget: $ 6,169.78
Total Budget Amount: $ 18,000.00

Add Expenses

Delete

Item	Category	Rate	Quantity	Amount Allocated to Grant	Notes

Add Expense   Add Mileage   Update Amounts

Expense Notes

Reviewer Notes:
No Notes from National

Attachments

No Attachments Found

Upload Attachment

Click "Upload Attachment" to add a document to the budget.

Previous   Update Amounts   Save

Review and Submit

Total Personnel and Fringe Budget: $ 11,830.22

Total Expense Budget: $ 6,169.78

Total Budget Amount: $ 18,000.00

No Notes from Affiliate

Reviewer Notes:
No Notes from National

Total Expense Budget: $ 6,137.39

Attachments

Add New Document

① Select the type of document you are uploading: Workers Comp, SUTA, Pension, or Other.
WC, SUTA, and Pension are the most common documents needed here, which is why they are listed out. Other is the catch all for any other document that may be needed.

Name

Workers Comp

| Workers Con ▾ |
| Workers Comp |
| SUTA |
| Pension |
| Other |

Upload Attachment

General Notes from N

Close   Save and Close   **Upload New Attachment**

Reviewer Notes:
No Notes from National

Update Budget   **Create Reimbursement**

Total Budgeted Amount: $ 18,000.00

There may be in-kind donations, as well as other leveraged funding used in order to implement the T.R.A.I.L. program.

No Notes from Affiliate

Reviewer Notes:
No Notes from National

Total Expense Budget: $ 6,137.39

Attachments

Add New Document

Name

Workers Comp

SUTA ▾

Notes:

Upload Attachment

② Click "Upload New Attachment"

General Notes from N

Close   Save and Close   **Upload New Attachment**

Reviewer Notes:
No Notes from National

Update Budget   **Create Reimbursement**

Total Budgeted Amount: $ 18,000.00

There may be in-kind donations, as well as other leveraged funding used in order to implement the T.R.A.I.L. program.

No Notes from Affiliate

Reviewer Notes:
No Notes from National

Add New Document

① You may leave this blank; however, if you choose to name the file for the upload, type in the new name here.
If you enter a name, **please** end the name with ".pdf" as some systems have challenges opening the file when renamed without this format label.

File Name: [   ]

Attachments

Choose File   No file chosen
File size is limited to 5 mb. Please upload PDF's ONLY.

Name

Workers Comp

Upload

**② Click "Choose File" to select the file to upload.
The file must be a pdf.**

Upload Attachment

③ Once you have selected the file, make sure you click "Upload."

General Notes from N

Reviewer Notes:
No Notes from National

Close

Update Budget   Create Reimbursement   mount: $ 18,000.00

There may be in-kind donations, as well as other leveraged funding used in order to implement the T.R.A.I.L. program.

No Notes from Affiliate

Reviewer Notes:
No Notes from National

Add New Document

1 You will receive a confirmation message if your upload was successful.

Budget: $ 6,137.39

Attachment uploaded successfully. Click "Choose File" to upload another attachment, or "Close" if you are finished.

Attachments

Name
Workers Comp

File Name:

2 If you choose to upload another file at this point, it will come under the same document type (e.g., WC, SUTA, etc.) as the already uploaded file. To upload another document of a different type, you will need to click Close and then Upload Attachment again.

Choose File | No file
File size is limited to 5mb. Ple

Upload Attachment

Upload

General Notes from N

Reviewer Notes:
No Notes fro ational

3 When you are done, click "Close."

Close

Update Budget   Create Reimbursement   mount: $ 18,000.00

There may be in-kind donations, as well as other leveraged funding used in order to implement the T.R.A.I.L. program.

No Notes from Affiliate

Reviewer Notes:
No Notes from National

To view an uploaded file, click on the link for the document under "View Attachment(s)."

Total Expense Budget: $ 6,137.39

Attachments

Name	Notes	Edit	View Attachment(s)
SUTA		✏	TestDocumentation.pdf
Workers Comp		✏	UserRequest-Personnel.pdf

Upload Attachment

If you need to delete an attachment (e.g., uploaded the incorrect document), please contact a T.R.A.I.L. finance team member at FirstPic for assistance.

General Notes from

Reviewer Notes:
No Notes from National

Update Budget   **Create Reimbursement**

Total Budgeted Amount: $ 18,000.00

There may be in-kind donations, as well as other leveraged funding used in order to implement the T.R.A.I.L. program.

Add Expenses

Delete

Item	Category	Rate	Quantity	Amount Allocated to Grant	Notes

Add Expense   Add Mileage   Update Amounts

Expense Notes

Reviewer Notes:

No Notes fr

When you are done, hit "Review and Submit."
This will take you to a screen where you can review what you have created before final submission.

Attachmen

No Attachm

Upload Attachment

Previous   Update Amounts   Save

Review and Submit

Total Personnel and Fringe Budget: $ 11,830.22

Total Expense Budget: $ 6,169.78

Total Budget Amount: $ 18,000.00

NCAI-00-000-EX-ZZ

TOTAL AWARDED: $18,000.00

Organization: BGC of Example Land	**Date Range:** -	**Duration:**	**Status:** Incomplete
Total Budgeted: $0.00	**Requested Amount:** $0.00	**Approved Amount:** $0.00	**Balance:** $0.00

NOTE: This budget has not yet been submitted. Please review and click submit.

Submit

If these numbers are different, you are required to enter information in the Personnel & Fringe notes explaining/justifying the proposed amount.

Attachments

No Attachments Found

Upload Attachment

Previous   Update Amounts   Save

Review and Submit

Total Personnel and Fringe Budget: $ 11,830.22
Total Expense Budget: $ 6,169.78
Total Budget Amount: $ 18,000.00

between airport and Mystic, CT

Per Diem - Full days	$64.00	2.00	$128.00	$128.00	$0.00	$0.00	$128.00
Per Diem - Travel Days	$48.00	2.00	$96.00	$96.00	$0.00	$0.00	$96.00

Expense Notes

No Notes from Affiliate

Reviewer Notes:
No Notes from National

Total Expense Budget: $ 10,158.33

Attachments

No Attachments Found

Upload Attachment

If you discover you need to make changes before submitting, scroll to the bottom of the review page and click on "Update Budget." This will take you to the beginning of the process and you will just click through until you get to whatever it is you need to adjust.

General Notes from National

Reviewer Notes:
No Notes from National

Update Budget

Total Budgeted Amount: $ 19,425.00

There may be in-kind donations, as well as other leveraged funding used in order to implement the T.R.A.I.L. program.

NCAI-00-000-EX-ZZ

TOTAL AWARDED: $18,000.00

| **Organization:** BGC of Example Land | **Date Range:** - | **Duration:** | **Status:** Incomplete |

| **Total Budgeted:** $0.00 | | $0.00 | **Balance:** $0.00 |

NOTE: This budget has not yet be...

Submit

Once you have everything entered the way you want, you must hit this submit button to complete the process and submit your budget for review.

Personnel

Title	Hourly/Salary	Rate/Salary	Wks on Grant	% on Grant	Amount Allocated	Requested Amount	Approved Amount	Balance	Notes
Accountant	✓ Salary	$26,000.00	40.00	2.0%		$0.00	$0.00	$0.00	💬
CPO	✓ Salary	$33,800.00	48.00	3.0%		$0.00	$0.00	$0.00	💬
Program Assistant	✓ Hourly	$9.25	14.00	25.0%		$0.00	$0.00	$0.00	💬
Program Coordinator	✓ Hourly	$13.00	34.00	50.0%		$0.00	$0.00	$0.00	💬

Fringe Benefits

Title	Medical	Dental	Vision	Short Term	Long Term	Life	Other
Accountant							

	FICA	SUTA	Workers Comp	Retirement	Other
	7.650% $30.52	0.400% $1.60	0.200% $0.80		

Helpful Tips

Equipment

- List nonexpendable items **$500 and over** that will be purchased. (**Example:** Laptop Computer)

- Laptop Computer (no more than $1,000)

- Sites that have already purchased certain items with T.R.A.I.L. funds, such as a computer, within the last three years cannot purchase another one under this funding cycle.

Equipment

- Provide information regarding how the equipment will be used to support/enhance the T.R.A.I.L. program in the notes.

  Example notes: Laptop computer to be used for accessing curriculum information, researching healthy snack recipes and new physical activity ideas as well as tracking participation and program reporting for the T.R.A.I.L. program.

Supplies

- Enter a **brief title** for the line item. (**Example:** Healthy Foods)

- Supplies include any materials that are expendable or consumed during the course of the program and **nonexpendable items under $500.**

- Nonexpendable items, especially items of significant value (over ~$75), need to be listed in their own individual line items (e.g., t-shirts, printers, digital cameras, etc.).

- Office/Program Supplies, Healthy Foods, Physical Activity Supplies, etc. each need to be listed as their own line item.

Supplies

- Provide information regarding how the supplies will be used to support/enhance the T.R.A.I.L. program in the notes.

- **Healthy Snacks:** List types of food items you plan to purchase as healthy snacks and for what events/activities.

- **Office/Program Supplies:** List examples of items you plan to purchase in this line item.

- **Physical Activity Supplies:** List examples of items you plan to purchase in this line item.

- **All Non-expendable items:** List how each item will be used with the T.R.A.I.L. program (remember to include a comment regarding the safety component for t-shirts).

Supplies

Example Notes:

- **Healthy snacks** will be provided to T.R.A.I.L. participants during regular meeting times and at various intervals throughout the year. Snack items will consist of fresh fruits and vegetables, whole grain breads/crackers, and bottled water as well as other items as outlined as acceptable for the T.R.A.I.L. program. Gatorade type beverages will be provided for participants after strenuous physical activities. Healthy food items for the hands-on cooking demonstration will also be purchased with these funds. Healthy snacks or lunches, as determined by the length of the trip, will be provided to T.R.A.I.L. participants during special events such as bowling, skating, swimming, etc.

Supplies

Example Notes:

- **Office/Program Supplies** such as paper, markers, poster board, paper plates, napkins, toner cartridges, etc. will be purchased for program implementation and administrative components of the T.R.A.I.L. program.

- **Physical Activity Supplies** such as various balls, lacrosse equipment, etc. will be purchased to support the physical activity component of the T.R.A.I.L. program.

Supplies

Reference the [T.R.A.I.L. resources section](#) of NAClubs.org for guidance on allowable items before purchasing snacks/food for the T.R.A.I.L. program. (Password: healthylifestyles)

Supplies

Office/Program Supplies:

- Materials needed to implement the curriculum (paper, markers, pencils, butcher paper, card stock, etc.)

- Paper products for serving healthy snacks (paper plates, napkins, cups, etc.)

- Record keeping materials (folders, notebooks, paper, binders, pens, etc.)

- Toner cartridges (although these are sometimes over $75, this item may be included within these supplies)

Supplies

Office/Program Supplies (continued):

- Community Service Project supplies (Informational Materials [paper handouts, display boards, healthy food display, etc.]; Gardening Supplies [seeds, starter plants, shovels, watering cans, etc.])

- Kitchen Supplies (<~$75*) (blender, mixer, measuring cups, juicer, food dehydrator, etc.)

- COVID-19 related cleaning supplies (Lysol sprays, sanitizing wipes, hand sanitizer, etc.)

Reminder: Items of significant value (~$75+) will need their own line item for specific approval of that item.

Supplies

Physical Activity Supplies:

- Sporting Equipment (various balls, bats, lacrosse equipment, hula hoops, Frisbees, jump ropes, portable basketball hoops, Zumba DVDs, etc.)

- SPARK Physical Activity Supplies

- Pedometers

- Bikes, roller blades, helmets, skating safety pads, etc.*

*Reminder: Items of significant value (~$75+) will need their own line item for specific approval of that item.

Supplies

- T-Shirts (no more than $10/shirt including any screen printing fees)
  - **Example Notes:** T-shirts will be purchased for safety purposes and easily identifying T.R.A.I.L. participants during special events.

- Printers (less than $150)
  - **Example Notes:** Printer will be used by the T.R.A.I.L. program for printing program handouts, flyers, information for parents, etc.

- Digital Cameras (less than $150)
  - **Example Notes:** Camera will be used by the T.R.A.I.L. program for taking pictures during curriculum lessons, physical activity, special events, etc. Photos will be used for promoting the program and required reporting.

- Storage Cabinets for T.R.A.I.L. supplies
  - **Example Notes:** Storage cabinets will be used for storing T.R.A.I.L. program supplies.

Travel – Club Vehicle

- Enter a brief title for the item. (**Example:** Skating Transportation)

- The purpose(s), destination(s), number of trips, and approximate round trip mileage of each trip needs to be included in the line item notes.
    - **Example Notes:** Travel by Club vehicle to transport T.R.A.I.L. youth skating three times during the year, 45 R/T miles each trip.

- Reimbursement will be made via mileage logs and gas receipts.

Travel – Personal Vehicle

- The purpose(s), destination(s), number of trips, and approximate round trip mileage of each trip needs to be included in the line item notes.
  - **Example Notes:** Travel by CPO using personal vehicle to closest store to purchase T.R.A.I.L. program supplies, etc. Approximately six trips throughout the year of 60 R/T miles each trip.

- Reimbursement will be made via mileage logs not to exceed the current GSA mileage rate.

Contract Specialists

- Enter brief title for the item. (**Example:** Zumba Instructor)

- Includes physical activity instructors, healthy cooking instructors, guest speakers, etc.

- Consultant fees may not exceed $650.00 for an 8 hour day ($81.25/hour)

Contract Specialists

- If there is a set fee per session, enter as total fee (rate) x number of sessions (quantity)

- If there is an hourly rate, enter as hourly cost (rate) x number of hours (quantity)

- Provide detailed information regarding what the contract specialist will be doing and how their services support/enhance the T.R.A.I.L. program in the notes.

Contract Specialists

Example Notes:

- **Healthy Cooking Demonstration:** A nutrition specialist will be contracted to provide a hands-on cooking demonstration for T.R.A.I.L. participants focused on healthy meals. Prep time will include planning the menu, shopping for supplies, and preparing the presentation. The demonstration will be approximately 2 hours.

- **Physical Fitness/Sports Instruction:** A fitness instructor will be contracted to teach 5 classes to T.R.A.I.L. participants throughout the year on different physical activities such as Zumba, Yoga, weight training, etc.

Other Costs

- Enter brief title for the item. (**Example:** Skating Admission Fee)

- **Per person fee:** enter as cost per person (rate) x number of participants (quantity)
  If you will be taking several trips, quantity should be number of participants x number of trips with an explanation about this in the notes.

- **Flat group rate fee:** enter group cost (rate) x number of trips (quantity)

Other Costs

- Admission fees for Physical Activity Events
  - Bowling
  - Swimming
  - Skating

Funds budgeted for Special Events may ONLY be spent on T.R.A.I.L. participants.

- Zoom Meeting fees
  - For remote/virtual T.R.A.I.L. program implementation

NOTE: Transportation costs related to special events need to be listed in the *Travel* category. Healthy food expenses related to special events need to be included in the *Supplies* category (Healthy Foods line item).

Other Costs

Example Notes:

- **Bowling admission/shoe rental:** T.R.A.I.L. participants will go bowling to support learning about different types of physical activities available in the area. Funds will cover lane time/shoe rental.

- **Skating admission:** T.R.A.I.L. participants will go skating to support learning about different types of physical activities available in the area. Funds will cover skating/skate rental.

- **Zoom Meeting fees:** The Club will be hosting weekly Zoom meetings with T.R.A.I.L. participants to implement the curriculum as well as stay in contact to promote healthy lifestyle choices.

Questions?

Questions or Further Assistance

Matt Bieler: (667) 307-4443; mbieler@firstpic.org

Katelyn Marshall: (667) 307-4451; kmarshall@firstpic.org

Robin Paterson: (667) 307-4454; rpaterson@firstpic.org