Template instructions

Throughout this template, instructions are in **red** text and can be replaced with the requested information (font color should be changed to black) or deleted.

Formatting requirements

* Applications must be in English.
* All currency values must be in US dollars.
* This budget narrative must be in 11-point font or larger in a standard font (e.g., Arial, Calibri, Times New Roman).
* Tables and charts can be in 10-point font.
* Pages should be on US letter-sized paper (8.5 x 11 inches or 22 x 28 cm) with 1-inch margins (2.54 cm).
* Pages should be numbered using an X of Y format in the lower left-hand corner (e.g., 3 of 5).
* This file should be submitted as a single PDF.
* If confidential data or information is contained in the application, the phrase “Confidential—do not disseminate” should be placed in the footer of each page.
* This file should be labeled *RFA2024-003\_budget narrative\_PI name*.

V1.0

Delete this page.

 

Your project name

Request for Applications RFA2024-003

This project is made possible by the generous support of the American people through the United States Agency for International Development (USAID) through the United States President’s Emergency Plan for AIDS Relief (PEPFAR), under the terms of Cooperative Agreement #AID-OAA-A-17-00015. The contents are the responsibility of PATH and do not necessarily reflect the views of USAID, PEPFAR, or the United States government.

 

Budget narrative

The budget narrative has no page limit; however, it should follow the layout of the detailed budget and describe how you arrived at the total dollar amount for each line item in your detailed budget. An Excel template is provided separately for the detailed budget.

The budget narrative should describe why the detailed budget is realistic and appropriate for completing the proposed project. Budget numbers that are mentioned in the narrative should match the numbers in the detailed budget.

If included, end-user research that is focused on identifying critical rheological and/or “look and feel” properties of drug delivery systems must be 25 percent or less of the proposed research activities and budget.

I. Personnel

Provide a brief explanation of personnel budgeted, including responsibilities as they relate to the grant. Also include assumptions made for any budgeted staff who are to be hired, including salary estimates for these personnel.

|  |  |
| --- | --- |
| Total personnel and benefits are budgeted at:  | US$ |
| Estimated total direct workdays for a full-time year:  | Number of days |

Personnel costs include salary and leave for staff who will work directly on the project. The names, locations, titles, responsibilities, salary rates, and total number of days in budget for each budgeted staff member are detailed in the table below.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Name** | **Location** | **Title** | **Responsibilities** | **Salary rates** | **Total number of days in budget**  |
| Doe, John | Seattle, WA, United States | Project director | Example: Serves as overall project lead and leads and manages team.  |  US$X | XXX days |
| Add rows as needed for key staff |  |  |  |  |  |

List other funding that is currently supporting key personnel. If any personnel are already supported by funding from the Microbicide R&D to Advance HIV Prevention Technologies through Responsive Innovation and eXcellence (MATRIX) project, state how much time key personnel have allocated for that work. Differentiate the work that will be done on their current MATRIX funding from the work that will be done in the activities proposed in this application.

II. Fringe benefits

Fringe benefits are budgeted at US$XXX.

Describe the components of fringe benefits included with the salary costs, for example, pension, health insurance, etc.

III. Travel

Travel is budgeted at US$XXX.

Explain and justify the travel budget and the assumptions used to determine the appropriate number of trips and personnel required, including per diem costs. Also include a brief rationale for how travel costs were determined. Travel is limited to one scientific meeting annually plus any travel necessary for coordination among collaborators.

Other travel-related costs, such as vaccines and passports, should be listed in the “Other direct costs” section of this document).

| **From/to** | **Total number of trips** | **Purpose** |
| --- | --- | --- |
| Add rows as needed |  |  |
|  |  |  |

IV. Equipment

Equipment is budgeted at US$XXX.

Equipment is defined as any item with a cost of US$5,000 or more **and** has a useful life of more than one year. A strong justification must be provided for any equipment purchase. The equipment budget must be equal to or less than 10 percent of the total budget. Any application requesting an equipment budget greater than 10 percent will be returned without review. Electronic equipment—such as computers, tablets, and smartphones—that meets the definition of equipment must be well justified for the proposed work. They should be addressed as separate line items in the table below and Excel detailed budget file.

Note that with any equipment purchase, MATRIX cannot guarantee that the purchaser would be able to retain the equipment after the project has ended. The United States Agency for International Development’s (USAID’s) approval for the organization to keep items of equipment with a current per unit market value of US$5,000 must be requested and received at the conclusion of the project. Additionally, if retention of the equipment is approved by USAID, the purchaser of the equipment must agree to annual inventory tracking of the equipment throughout its useful life or for five years after the conclusion of the project (whichever comes first).

Any equipment intended to be purchased during the award will require USAID approval prior to purchase.

|  |  |  |  |
| --- | --- | --- | --- |
| **Item name and description** | **Quantity** | **Unit cost** | **Rationale** |
|  |  |  |  |
|  |  |  |  |

V. Supplies

Supplies are budgeted at US$XXX.

Note that supplies are items that do not meet the cost threshold or useful life definition under the equipment section above (i.e., supplies are items that cost less than US$5,000 **and/or** have a useful life of less than one year).

Please provide an itemized description of budgeted supplies required to perform the scope of work (i.e., laboratory supplies, raw materials, human subject compensation, etc.). Costs for animal acquisition and animal handling need to be kept as separate line items.

VI. Contractual costs

Provide a brief description and justification of the work to be performed by a subrecipient or contractor in support of the overall project and describe any expenses.

Consultants are budgeted at US$XXX.

If a consultant is required, provide a brief description of their expertise, the services they will provide, and a justification for why the consultant is required to complete the project. Include the consultant’s daily rate in the budget narrative and their biosketch.

Subagreements are budgeted at US$XXX.

For each proposed subagreement, include a brief description, justification, and a separate detailed budget for the subrecipient. Create an additional copy of the Excel detailed budget form. Please include an accompanying budget narrative for each cost in this section.

Subcontractors are budgeted at US$XXX.

For each proposed subcontractor, include a brief description, justification, and a separate detailed budget for the work that will be performed by the subcontractor. Create an additional copy of the Excel detailed budget form. Please include an accompanying budget narrative for each cost in this section.

VII. Construction—not applicable for this scope of work

Applications with a request for costs to construct or modify research spaces to conduct the proposed work will be returned without review.

VIII. Other direct costs

Other direct costs are budgeted at US$XXX.

Provide itemization of all other direct costs that do not fall under the above categories. Non-allowable direct costs include costs for construction of, or modifications to, research spaces; rent; general office equipment; and transportation not associated with described travel or human subject per diems. Applications with such requests will be returned without review.

IX. Indirect costs

Indirect costs are budgeted at US$XXX.

Describe how the indirect rate is determined and what costs fall under the indirect rate.

* Organizations with a Negotiated Indirect Cost Rate Agreement (NICRA) with the US government may use that rate.
* Organizations that do not have a NICRA may submit an application to PATH justifying an indirect cost rate that will be consistently charged across all of the entity’s programs.
* If an indirect rate is budgeted, a NICRA or other supporting documentation that outlines a cost allocation policy and methodology must be provided.

X. Cost share requirement

Cost sharing amounts are a total of US$XXX.

USAID requires a 5% cost sharing for all awards. Awards will not be made without a commitment by your institution or partners for cost sharing. Cost-sharing can come from various sources including but not limited to volunteer services, donated employee time, donated supplies, cash contributions, donated equipment, or project co-funding. Resources must come from non-USAID funds. The cost share requirement can be met throughout the life of the award in accordance with [2 CFR 200.306](https://www.ecfr.gov/current/title-2/subtitle-A/chapter-II/part-200/subpart-D/section-200.306) and Standard Provision on Cost Sharing. Describe how your project will meet the cost sharing requirements.