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 (2.54 cm) margins.
* 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 *RFA2024-016\_budget narrative\_Mentee name*.

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V1.0

Graphical user interface

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Request for Applications RFA2024-016

Budget Narrative

|  |  |
| --- | --- |
| Fellow name: |  |
| Title: |  |
| Organization: |  |
| Department: |  |
| Country: |  |
| Email address: |  |
| Project name: |  |

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 MATRIX, USAID, PEPFAR, or the United States government.

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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. MATRIX will award up to $150,000 per award.

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.

The salary for the mentee should be completely covered by the award.

Time for mentoring is not covered in the award, but time for mentor(s) to contribute to the research can be included.

|  |  |
| --- | --- |
| 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. Mentees will also be expected to travel to the MATRIX Investigators Meeting in August 2025, located in Africa.

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—not applicable for this scope of work

Purchase of equipment is not allowed under this award. Equipment is defined as any item with a cost of US$5,000 or more **and** a useful life of more than one year. Equipment should be supplied by the mentor. Applications that propose the purchase of any equipment will be returned without review.

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).

Electronic purchases—such as computers, tablets, and smartphones—must be well justified for the proposed work. They should be addressed as separate line items below and in the Excel detailed budget file.

Please provide an **itemized** description of budgeted supplies required to perform the scope of work (i.e., laboratory supplies, raw materials, 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 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 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.

Additional costs associated with the mentee’s training, such as university tuition and fees, can be included as indirect costs. An amount equal to 75% of the level requested by the university can be provided by this award.

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 from your institution 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 sharing 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.