

## How to plan a budget: A Checklist

These are the major tasks in developing a solicitation. They're arranged in rough chronological order, but the order may vary depending on your project.

<b>Essential</b>	<p>The budget for the CCI Project, and for each site, <b>should allocate funds to support...</b></p> <ul style="list-style-type: none"><li>_____ a full-time, highly skilled, well-connected <b>project director</b> (Less experienced staff cost the project less but may not have standing or backing to convene executives of public and private agencies in the community.) <a href="#">Learn more</a></li><li>_____ <b>technical assistance</b> (Set aside a minimum of 10% of the total budget — more depending on the scope of the project.) <a href="#">Learn more</a></li><li>_____ <b>evaluation</b> (Again, set aside a minimum of 10% — more depending on the scope of the project.) <a href="#">Learn more</a></li><li>_____ <b>travel</b> by site representatives to cross-site meetings and other locations for mentoring, information gathering, and training</li><li>_____ <b>information technology</b> for data collection (including cross-site data), data management, and information-sharing (Funds might be used to assess, seed, or expand the IT system. Amounts should be reasonable.)</li><li>_____ the <b>participation of community members</b> through, for example...<ul style="list-style-type: none"><li>_____ reimbursement for transportation and/or child care</li><li>_____ stipends (to show that their time is valued)</li><li>_____ food and drink for meetings</li><li>_____ mini-grants to neighborhood organizations to help them defray the costs of staff to participate in the CCI.</li></ul></li><li>_____ a meeting that brings together all project participants for <b>visioning and strategic-planning</b>, including the cost of facilitators. (Repeat at least once a year.)</li></ul> <p>And, <b>be sure to...</b></p> <ul style="list-style-type: none"><li>_____ carefully review applicants' budgets to make certain that funds will be used to support activities that could conceivably lead to the development of <b>collaboration or systems-change</b> work. (Funds should <b>not</b> be "passed-through" to collaboration partners, for example, by sub-granting most of the funds to other agencies for client services.) <a href="#">Learn more</a></li></ul>
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**Optional**

If possible, budget for funds to support:

- \_\_\_ individuals to serve as **liaisons to other agencies** (Fund the time of staff to meet with other agencies.)
- \_\_\_ cross-agency **shadowing**
- \_\_\_ **public-education and public-information** programs (along with the resources to support these programs, such as websites, brochures, and publications)
- \_\_\_ small-scale introduction of new, **evidenced-based programming**
- \_\_\_ development and testing of unified, cross-agency **tools for intake, assessment, and screening**
- \_\_\_ further training and technical assistance to promote **collaboration.**

You might also want to...

- \_\_\_ use a **"bell curve"** funding strategy (Dedicate a smaller amount at the beginning to support planning and start-up, and a smaller amount at the end to promote sustainability and encourage grantees to find other sources of funding.) [Learn more](#)
- \_\_\_ build-in a **match requirement** (Although public/private partnerships are not required by the federal government, you could offer this as an option for encouraging grantees to diversify their funding - thus bolstering their chances for sustainability.)