

BUDGET TEMPLATE

TO USE WHEN A COLLABORATION WANTS TO SUBMIT ONE JOINT PROPOSAL

- **Coalition Budget** - Top half of the budget shows items that the entire coalition is going to share in order to succeed at the collaboration.
- **Collaboration Budget** - Bottom half of budget shows resources of each individual organization to fulfill its specific organizational obligations to support the collaboration.

Example Budget

Timeline: January 1, 2022 – July 31, 2022 Include a timeline right up front

Since the timelines for a collaboration often do not follow the typical yearly grant cycle it is important to be clear right up front so that you can track the outcomes accordingly. In my example this means that the yearly budget for this collaboration could reach over \$1 million, even though the six month timeframe has it at a little over \$500,000. This is something to watch closely because you need to be very clear with all of the groups involved how much money it will realistically take to achieve the outcome desired in the collaboration within a set timeframe.

NOTES FOR COALITION BUDGET/TOP HALF OF BUDGET:

You will note in my hypothetical scenario I include lots of contractors in the top half of the budget. The benefit of short-term contractors is they are time-limited and are specialists in a particular outcome that the coalition needs to succeed.

However, what you may also find is that one trusted organization that is a part of the collaboration is willing to take on some of the joint coalition work. In my hypothetical example below I include such a scenario and refer to “the Houseless Action Group” (made up group) in the Coalition Coordination section because often times when staff are hired to direct a coalition it is more efficient for an existing organization to take on the staffing, rather than to create an entirely new 501 C(3). However, if you are a launcher funder you may wish to support the coalition to create its own 501 C(3) instead of relying on an existing organization.

Make sure to ask the coalition members how they are making final decisions about how to allocate resources and make decisions about where to prioritize efforts in the coalition. This is important because if the coalition failed to raise its entire budget it will need to prioritize how it spends coalition money.

Sometimes you will notice that when you start asking questions about how the group makes decisions that it is in fact too difficult for them to actually make decisions together for a variety of reasons. If this is the case, it will be better for you to discover that early on and then ask the nonprofits to submit separate budgets and proposals to you to work on the coalition effort, rather than forcing them all to submit one joint budget.

Top Half of Budget – Example Coalition Budget

Coalition Expenses	Category	Description	Amount
COMMUNICATIONS	Strategic Plan	For a communications consultant to create a strategic plan prior to launching our social media strategy.	\$10,000
	Polling	To poll our expected audience so that our messaging resonates with our targets.	\$40,000
	Social Media Firm	To increase presence on Instagram, Facebook, You Tube and Linked In.	\$100,000
	Social Media Artwork/Videos	To create short clips and art that advertised our issue in order to encourage sign-ups for critical public meetings about the issue.	\$20,000
SUB-TOTAL:			\$170,000
RESEARCH	A primer on the problem with Solutions	Contract a well-regarded leader in the field to coordinate a blue ribbon panel to create a primer that is shared with the public and decision-makers	\$15,000
	Meeting facilitation	Contract a meeting facilitator to organize all of the meetings by the Blue Ribbon Panel.	\$15,000
SUB-TOTAL:			\$30,000
COALITION COORDINATION <small>Note: The Houseless Action Group is going to employ the staff for this coalition</small>	Coalition Director	Hire a person to organize and coordinate all of the pieces of the coalition to ensure everyone is moving in the same direction.	\$100,000
	Grassroots and community organizers	Hire three grassroots and community organizers that report to the Coalition Director to work with the public directly to move the issue forward.	\$200,000
SUB-TOTAL:			\$300,000
GROUP TRAININGS	Justice, Equity, Diversity and Inclusion	Contract and expert facilitator on JEDI to ensure that the coalition is incorporating the JEDI themes into every aspect of the coalition effort.	\$15,000
	Social Media and Communications	Contract a media expert to train everyone on the best messages that will move the campaign forward.	\$10,000
SUB-TOTAL:			\$25,000
TOTAL:			\$525,000

Bottom Half of Budget – Example Collaboration Budget

Organization	Description of Contribution	Committed	Need
Houseless Action Group	Organize community activists to participate in public events	\$100,000	\$50,000
Tent City Advocates	Support and promote storytelling about houseless people's lives	\$50,000	0
Transition Housing Support Center	Offer concrete data about the houselessness populations – who they are and how to help	\$25,000	0
University Research Center for Houselessness Solutions	Work with the Transition Housing and Support Center to review the data and offer policy solutions	0	\$25,000
TOTAL:		\$175,000	\$75,000

Then each organization adds a paragraph to give flavor to the bottom half of the budget detailing what they are spending funding on already how the extra fund are needed to help the coalition effort succeed. This is also an opportunity for the nonprofit to explain why they may have an outstanding financial need to be able to fully participate in the coalition effort.