GILEAD

07 Module

BUDGET AND TIMELINE

About This Module

This module provides guidance on creating a budget and timeline tailored specifically for Community-Based Participatory Research (CBPR) initiatives, ensuring alignment with project goals and facilitating effective resource management. These elements are crucial components of a funding proposal, demonstrating strategic planning and a commitment to achieving impactful outcomes through collaborative community research.

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Creating A Project Budget

Refer to the Request for Proposal (RFP) guidelines to determine the preferred format for submitting budget details. Depending on the requirements, you might need to submit a separate Word document or an Excel spreadsheet using a template provided by the funding agency. Alternatively, the submission process may involve an online portal where you can follow step-by-step instructions and fill out forms for entering budget information. If no submission instructions are provided, inquire as to whether there is one before creating your own. Consider all project expenses beforehand and strategize how funding will be allocated before proceeding with data entry. Taking this preparatory step ensures clarity and accuracy in budget allocation during the submission process.

In general, the budget includes the total proposed amount organized by year.

The funding agency may have its own template (MS Word document or an Excel spreadsheet) or structure (an online portal) for the budget.

Review proposal requirements in the RFP to ensure your budget complies to internal and external requirements.

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01. **Identify costs:** Below are some common cost components to consider. Note any limitations on the types of costs prohibited in the RFP. For example, some RFPs state that funds cannot be used for equipment purchase, staff costs or car rental.

DIRECT COST

Direct costs are expenses that can be directly tied to the project's budget:

- **Personnel:** Allocate funds for project staff, including researchers, community coordinators and administrative support. Consider salary, benefits and subcontracting costs (e.g., contractors, focus group facilitators).

- **Materials and supplies:** Budget for project supplies such as data collection tools and materials for community meetings.

- **Travel and meetings:** Include expenses for travel to community sites, meetings with stakeholders and conferences. Include airport transportation, parking and per diem if applicable.

- **Community engagement:** Allocate resources for community meetings, focus groups, workshops and incentives for participants.

- **Evaluation and data analysis:** Budget for data collection tools, software licenses, statistical analysis packages and evaluation reports.

- **Communication and dissemination:** Include expenses related to developing and producing print materials as well as presenting at conferences, town halls and other meetings.

INDIRECT COST

Indirect costs are expenses not explicitly tied to the project's budget but are necessary for the general operation of project activities

- **Overhead expenses**

- **Facility costs**

- **Administrative fees**

02. **Develop a budget narrative:** In your proposal narrative, explain the rationale behind the budget, describing how each cost aligns with specific project activities and contributes to the overall of the CBPR initiative. Ensure that the budget items and narrative align with the project objectives outlined in other sections of the proposal.

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Establishing A Project Timeline

Describe the steps of the proposed research project in a timeline that lays out the work task by task, including expected outcomes and projected dates of completion for each key task.

01. Project phases and milestones: Establish a logical sequence of activities, ensuring that each phase builds upon the previous one and aligns with project goals and timelines.

- **Planning:** Outline activities such as community needs' assessments, stakeholder engagement and research protocol development.

- **Implementation:** Specify timelines for data collection, community interventions and ongoing collaboration with stakeholders.

- **Analysis and reporting:** Allocate time for data analysis, interpretation of findings and preparation of reports for stakeholders and funders.

- **Dissemination and evaluation:** Plan for sharing results with the community, presenting at conferences and conducting evaluations.

02. Timeline visualization:

- Provide a clear, comprehensive timeline that outlines project milestones and activities from start to finish. Include key dates for data collection, community engagements and dissemination of results.

- For another approach, create a project timeline using a template built into Excel.

- These visual tools illustrate key milestones, deadlines and relationships between project activities. This helps team members and stakeholders keep track of activities and deadlines throughout the project period.

03. Flexibility: Build in some extra time in the plan to accommodate unexpected delays and any adjustments needed during the research process.

Timelines Will Generally Include:

- The duration of each phase

- Objectives within each phase

- Deliverables per phase

- Dates of completion for each task

Funding agencies commonly request a visual tool to ensure the timely completion of agreed-upon deliverables.

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