Instructions to Complete RFP Contract Attachment B Proposed FY 19 Academic Year 2018-2019 Article IV Program Support Budget

This form is used to submit the budget for the academic year support program and the 12 month salaries and wages for permanent program positions. Include all funding sources in the columns provided – EOF (Art. IV), Institutional, and Other Resources. Use the excel form as provided by EOF/OSHE on the website. The figures you enter will automatically transfer to the expenditure reports which are included as worksheets on this file. Therefore, any corrections or amendments you make throughout the year will also transfer to the expenditure reports.

EOF Regulation 9A:11-6.9 (c) requires at least a dollar for dollar match by the institution against the EOF allocation. Funding from other resources may also be used in meeting the matching funds requirement. The EOF director’s salary and fringe benefits applied to the director’s position may not be paid by EOF Article IV funds. It must be covered by the institution or through other sources. The director’s salary may be counted as part of the institution’s contribution to meet the dollar for dollar match requirement. Personnel who do not provide direct services to EOF students above and beyond those provided to the general student population may not be included on this budget. Additionally, program reporting supervisors and other high level institutional officers who are required to serve all students should not be included as part of the institutional match. Please note that programs may not include those individuals whose total percentage of commitment to the EOF program is less than 10%. Programs will need to ensure that the appropriate documentation and accountability records (i.e. description of time and effort, timesheets, etc.) are kept for all individuals whose percentage of involvement with the EOF program is less than 100%.

Complete B3 as follows:

Begin by entering the institution’s name in the space provided on each page.

Explanation of Categories by row…

I. Personnel

In the following Personnel categories, enter the total dollar amount charged to this budget for all full-time and part-time EOF program staff employed in the operation of the academic year program. Include 12 month salaried staff. Begin by providing each individual’s total annual salary paid by the institution – EOF and other job assignments. Next enter the percentage of time dedicated to the EOF program only for each position. Continue across the columns for each employee’s line and indicate the source of funding (EOF, Institution, and/or Other Resources). Calculate the “Total Funding” for each position based on the “% Time EOF” only.

As an example, if a counselor’s annual salary is $80,000 but is employed only 50% time with the EOF program, the “Total Funding” entry for this position must calculate to $40,000 as paid by any combination of EOF, Institution and/or Other Resources.

Subtotal each funding source column in each category.
Administrative: EOF funds may not be used to pay the salary or fringe benefits of the EOF Director. The program’s reporting supervisor and other high-level campus officials are generally thought to serve the entire student body by virtue of their title and responsibilities and therefore should not be listed on this budget or used as part of the institutional match. List in this category the salaries of the Program Director, Associate Directors and Assistant Directors. Only institutions that have received approval by the EOF Executive Director to have a less than 100% time EOF Director may correct that percentage of time on this budget.

Counseling: Enter the salaries or wages of all academic year academic advisors, developmental specialists and professional or peer counseling staff.

Tutoring: Enter the salaries or wages of the tutorial coordinator and all academic year professional, para-professional or peer tutoring staff. For part-time personnel indicate the number of positions, the hourly wage and estimated hours of employment used to calculate the budget charge.

Instructional: Indicate the costs of all instructional staff who provide supplemental instruction, teach shadow courses, learning laboratories, etc. You may include the costs of test-prep classes or workshops here. Do not include salaries for individuals teaching courses for which students are charged tuition, including basic skills course sections reserved for EOF students or freshman orientation credit courses.

Clerical: Enter the salaries or wages of all clerical staff (secretaries and administrative assistants) who directly serve the EOF program during the academic year.

Other Salaries: Itemize here the costs of other campus staff who provide a direct service to the program (accounting, financial aid, etc.); workshop presenters; speakers; consultants; etc.

I. Total Personnel: In each column, enter the sum for personnel listed in the categories above.

II. Fringe Benefits: Enter the total amount of fringe benefits for academic year staff listed in the categories above. EOF funds may not be used for fringe benefits at the senior public institutions. At public two year and independent institutions, fringe benefits paid from EOF funds may not exceed 21% of the salary for full-time staff. Benefits for full-time institutional staff members who are less than 100% time EOF must be adjusted accordingly. EOF funds may not be used to pay employee benefits for student assistants and part-time personnel.

III. Total Personnel
And Fringe: Enter the sum of Total Personnel and Fringe Benefits in each column.

III. Educational Materials
And Supplies: In each column, list the purchases you have planned for the year and then enter the total amount budgeted for educational materials and supplies for the academic year program. Examples of educational materials and supplies may include classroom texts used as references for tutoring purposes.

V. Consumable Materials and Supplies: Provide the same information as above for consumable materials. Examples of consumable materials and supplies include office and copier supplies.

VI. Professional Development and Student Leadership Development: Budget across the columns the cost of registration fees and room and board expenses associated with staff attendance at conferences, webinars and workshops focused on professional development. Repeat the same for costs associated with student leadership development activities for EOF students. Do not include related transportation costs in this section. Report those below, under Travel.

VII. Travel: Provide the amount budgeted for staff professional development or administrative travel and student travel related to professional development and leadership training. Those costs include mileage, tolls and public transportation fares. Charging transportation of students for normal commuting costs is prohibited under Article IV.

VIII. PAB: Enter the costs associated with Program Advisory Board meetings and activities.

IX. Other Services: Itemize the budgeted costs of other allowable items that do not fall into one of the categories listed above. For audit purposes, clearly specify each line item. Indirect/overhead costs may be used to meet the required match but may not exceed 10% of the TOTAL program cost.

TOTAL BUDGET: Add up categories I. through IX. in each column. The EOF column may not exceed the Article IV allocation. Check that the institution has met the required match. Please ensure that each amount listed and all of the respective totals have been listed accurately.

Line Item Descriptions
The academic year 2018-2019 Article IV Budget (RFP Attachment B) includes a worksheet tab labeled “Line Item Description”. For audit purposes, the following information must be provided. For program staff listed in the Personnel section, briefly explain each position’s primary EOF responsibilities. When positions are less than 100% time EOF, explain what the individual’s other job responsibilities are on campus. For Other Than Personnel Services, explain on a per item basis the charges in each budget category.