

BUDGET INSTRUCTIONS

The following instructions are intended to provide an explanation for completing the OSI Budget Document. Your budget is a critical part of your grant application. It is in your best interest to ensure that figures and details provided are accurate and reasonable to the best of your ability.

Please prepare your proposal in English using the following formats. When you are requesting a new grant the following forms of the budget document should be completed and submitted to OSI.

Your Budget Document should become the basis of your Financial Reporting at the end of the grant period. All expenses reported at the end of the grant period must be clearly presented in your initial Budget Document or subsequently approved through a supplemental Budget Document.

A./ BUDGET REQUEST FOR A GRANT

Section A.1: Identify the name of the institution and the person in charge of the proposal. The proper address and contact numbers must be listed.

Section A.2: Please state the name of the project and describe the purpose and overall aims, as well as the goals and objectives you intend to accomplish with it.

Section A.3: Please estimate the amount needed and when payments should be made by preparing the schedule showing target date(s) and amount(s) to be transferred at that time.

Section A.4: The transfer of funds you are requesting will be initiated per the information provided in this section. With this in mind, please ensure that all banking information necessary is accurate.

B./ BUDGET SUMMARY

The Budget Summary is intended to provide a clear overview of the itemized expenses listed in your Budget Detail.

Project Title and Contact Person

Project Period and Budget Period - The Project Period should describe the length of the entire project. The Budget Period should under no circumstances exceed that of the Project Period. If the length of your project exceeds one year, for administrative purposes you will be required to fill in a separate Budget Document for each year, or portion of a year of your project. You will also have to complete an additional Budget Summary, summarizing the total costs and length of the entire Project and Budget Period.

In addition, if your project combines two or more areas (such as training, automation, preservation & access, or collection development) please complete a separate budget for each area. It is especially important to list the matching funds received for each area separately.

1. Expenses

This section is intended to provide an overview of funds necessary to successfully complete your project. There are three columns, which are broken down into the following budget categories: Equipment; Administration; Educational Supplies; Contracts, Consultants, & Honoraria; Travel; and Other. For a detailed explanation of each category, please see the Budget Detail instructions.

Total Expenses - In this column please list the overall costs of your project.

Other Funding - In this column please list the matching funds which have been received from other sources.

OSI Funding - In this column indicate the portion of the total expenses which you are requesting from OSI. Please separate the amounts that you are requesting from National Soros Foundation and OSI Network Library Program.

2. Sources of Funding

Include more detailed information on all funding sources which contribute to the project, including OSI. The total in this section should equal the total amount required to complete the project - i.e. the Total Expenses column from **Expenses** section. The names of the institutions providing funding should be listed in the column entitled **Source**.

C./ BUDGET DETAIL

Each of the six expense areas shown on the budget summary is listed separately here. Use your best judgment as to which area a particular should be listed. Remember that the person reviewing the budget does not know as much as you do about the project, so be specific. Please be sure to include other funding sources wherever applicable.

1. Equipment and Capital Purchases

List items such as computers and software in this section, but not items such as books or subscriptions, which should be listed in section 4. Educational Supplies. Please provide the model specifications and quantity of each item.

2. Administration

This section is for administrative expenses. Include items such as rent (for conferences), telephone, postage, office supplies, office related publishing expenses, translating, membership, etc. Provide a detailed description of each item. Please create your own list for expenses which are not shown.

3. Educational Supplies

Include items such as books, journals, subscriptions, publishing costs for conference materials, and other teaching materials. Provide lists of all requested books and journals.

4. Contracts, Consultants, and Honoraria

Please list the costs of non-payroll employees related to the project. List items such as consultants and temporary contract employees' expenses, research fellowships, study scholarships, guest honoraria, auditing, etc.

5. Travel

This section should contain all costs related to travel, accommodation, meals, per diems, etc. Please complete the worksheet for out-of-town travel, and list the amount needed for local travel (i.e. taxi, airport buses, etc.).

6. Other

Please list other expenses which do not fall into any of the above categories, and provide a detailed description for each item.