

Andrew Carnegie Fellows Program

Step-by-step guide to filling out the budget forms

We understand that the figures you enter may not be exact. Our goal is to understand how you will use the fellowship to support your project. If you are selected, you will have the opportunity to revise your budget before the fellowship begins.

We ask that you please use round numbers when entering your costs. The total funds requested from Carnegie Corporation should be \$200,000. You may not exceed \$200,000.

Please keep in mind that the Corporation does NOT fund overhead, dissertations, debt repayments, lobbying efforts, the purchase of equipment, or rent.

Project Information: Starting with worksheet (aka “page” or “tab”) 1 at the top of the page in the spaces provided, fill in your name, the title of your project, and your institution (Picture 1).

Picture 1

	A	B	C	D	E	F	G	H
1	Carnegie Corporation of New York							
2	Budget Summary							
3	Need an explanation? Move cursor over cells with red upper right corner.							
4	Name:	Jane Smith						
5	Project Title:	ABC Project						
6	University or other institution	XYZ University						
7								

Funding Dates: Next indicate:

- When you want your fellowship period to begin. You may pick the first day of any month from June through September 2024;
- When you want your fellowship period to end. You may choose to end after 12 months or 24 months. If, for example, your fellowship starts July 1, 2024, and you want it run for 12 months, enter July 1, 2024 to June 30, 2025 in columns *C* and *D*, under “First Year Requested Carnegie Funds/First Year Support from your university” (Picture 2). If you are choosing a 12-month fellowship period, leave blank columns *E* and *F*, under “Second Year Requested Carnegie Funds/Second Year Support from your university.” Similarly, if your fellowship starts July 1, 2024, and you want it to run for 24 months, enter July 1, 2024, to June 30, 2025, in columns *C* and *D*; enter July 1, 2025, to June 30, 2026, in columns *E* and *F* (Picture 2).

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Picture 2

	A	B	C	D	E	F	G	H
10			First Year Requested <u>Carnegie</u> Funds	First Year Support from your university (or other institution, in addition to Carnegie)	Second Year Requested <u>Carnegie</u> Funds	Second Year Support from your university (or other institution, in addition to Carnegie)	Total Requested from Carnegie	Total Project Budget
11								
12	[Budget beginning and ending dates and the total amount requested from Carnegie must match your proposal.]							
13	Funding Dates:							
14	[Use First Day of Month (Example: 7/1/2024)]		From: [mm/dd/yyyy]		From: [mm/dd/yyyy]			
15			To: [mm/dd/yyyy]		To: [mm/dd/yyyy]			
16	[Use Last Day of Month (Example: 6/30/2025)]							
17								

Institutional Support: In columns *D* and *F*, fill in the funds that will be provided by your university or institution in each category. (If your fellowship period is only 12 months, leave column *F* blank.) The total will be automatically calculated and appear in column *H* (Picture 3). Do not worry about columns *C* and *E*; they will automatically populate with information from worksheet tabs 2-5. (After you have completed all worksheets of the budget, please sign and date in the area indicated at the bottom of worksheet 1.) When you are finished, skip to worksheet tab 2, entitled “Salary.”

Picture 3

	C	D	E	F	G	H
	First Year Requested <u>Carnegie</u> Funds	First Year Support from your university (or other institution, in addition to Carnegie)	Second Year Requested <u>Carnegie</u> Funds	Second Year Support from your university (or other institution, in addition to Carnegie)	Total Requested from Carnegie	Total Project Budget
	g dates and the total amount requested from Carnegie must match your proposal.]					

Salary: On tab 2, please enter your total annual salary and benefits and the amount you are requesting from Carnegie Corporation in the boxes indicated, for each project year (Picture

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Travel: On worksheet 4, please indicate the trips you intend to take each year (Picture 6). For each trip, please enter the origin, destination, and length of stay in the box. If you are not yet sure of your destination, please include as much information as possible in the area beneath the chart. For example, “the destination will be Las Vegas or Dallas” or “a city in the continental United States.” For Air or Rail costs, enter the number of travelers and the cost per person. For the other categories—Local Transportation, Hotel, Per Diem, and Other—please indicate the number of travelers, the cost per person, and the number of days. If, for example, you and a research assistant are traveling together in the first year, enter “2” in column *B* and the cost of lodging for each person in column *C*, and the number of nights in column *D*. The totals on each row will not automatically calculate but the Trip Total will. and fill in the designated area on tab 1, the “Budget Summary”. Please explain how your travel relates to the project in the area indicated.

Picture 6

	A	B	C	D	E
7	First Year				
8	Origin & Destination:	Example: NYC, NY to Dallas, TX			
9	Length of Stay:	Ex: 10 days			
10	Who is traveling?	Ex: Carnegie Fellow Jane Smith and one Research Assistant			
11		# of Travelers	# of Days	Rate per Day	Total
12	Flight or Rail Costs:	2		500	\$1,000
13	Local Transportation:				
14	Hotel:	2	10	100	\$2,000
15	Per Diem:				
16	Other (please explain below)				
17	Trip Total:				\$3,000
18					
63	First Year Total				\$3,000
64					
65	Please explain how your travel relates to the project and any additional				
66	explanation necessary.				
67					

Please specify if you plan to travel to countries the U.S. has sanctions against. A complete list may be found on the [Treasury Department's website](#). Please note that the Corporation does not fund business class travel. If you do not plan to travel, leave this page blank.

Conferences: On tab 5, please enter the cost of conferences you plan to organize or attend in each year, if any (Picture 7). Please indicate the name **and location** of the conference. For each

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category—Air/Rail, Local Transportation, Lodging, and Meals—please indicate the number of travelers and the cost per person. The total will calculate automatically in the third column and fill in on page 1, the “Budget Summary” page. If you are organizing a conference, please enter the meeting facility. Please explain how the conferences relate to the project, in the area indicated. If you do not plan to attend or organize conferences, leave this page blank.

Picture 7


	First Year				Second Year			
6								
7	Conference: Example: Pacific Marine Symposium				Conference:			
8	Origin & Destination: Ex: New York to Los Angeles				Origin & Destination:			
9	Who is traveling? Ex: Carnegie Fellow Jane Smith				Who is traveling?			
10		# of Attendees	Cost per Person	Total		# of Attendees	Cost per Person	Total
11	Air/Rail:	1	\$ 300	\$300	Air/Rail:			
12	Local Transportation:	1	40	\$40	Local Transportation:			
13	Lodging:	1	400	\$400	Lodging:			
14	Meals:				Meals:			
15	Meeting Facility:				Meeting Facility:			
	Other:				Other:			
16								
17	Total			\$740	Total			\$0
43	First Year Total			\$740	Second Year Total			\$0
44	Any additional explanation, if needed.				Any additional explanation, if needed.			
45								

Other: On worksheet 6, entitled “Other,” please explain any expenses that fall outside the provided budget areas (Picture 8). If requesting an alternate payment schedule, please include that information on this page. Please be sure to provide explanations for how you arrived at your estimates. For example, “editing costs for this book are based on the average editing costs for my previous two books.” Wherever possible, indicate a breakdown of costs. For example, “we anticipate conducting 100 half-hour interviews at a rate of \$12 per hour.”

	A	B	C	D	E	F	G	H	I	J
1										
2	<u>OTHER ITEMS: NARRATIVE EXPLANATION</u>									
3										
4	Please use this area to explain budget items not described elsewhere. If requesting an alternate payment schedule, please include that information here. Please keep in mind that the Corporation does NOT fund overhead, dissertations, debt repayments, lobbying efforts, the purchase of equipment, or rent.									
5	For all expenses listed in this category, please provide an explanation of how the estimate was arrived at or a breakdown of costs. For example, "editing costs are estimated based on a previous book" or "the survey will include 100 participants at a rate of \$15 per person."									
6										
7										
8										
9										

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Sign and Date: When you have completed all the pages, *please sign and date* the budget in the area indicated at the bottom of page 1, entitled “Budget Summary.” We ask that you either print, sign, and scan your budget or use an electronic signature; a typed name will not suffice.

38	Type/Print Name	Jane Smith	
39		I hereby certify that the figures in the budget represent a good faith estimate of costs anticipated under this project and to which Carnegie Corporation grant funds will be applied.	
40	Signature:		
41	Date:	11/5/23	