

# 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.*

*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**

<b>Carnegie Corporation of New York Budget Form (US\$)</b>	
<b>Name:</b>	
<b>Project Title:</b>	
<b>Institution</b>	
<b>Instructions: For clarity and compliance purposes, we request additional information for certain budget line items, please move your cursor over cells with a red upper right corner for additional information. By submitting the figures included in this budget, you certify this represents a good faith estimate of costs anticipated under this project and to which Carnegie Corporation of New York grant funds will be applied.</b>	

### **Start/End 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 07/01/2024 for the “Start” date and 06/30/2025 for the “End” date (Picture 2). Similarly, if your fellowship starts July 1, 2024, and you want it to run for 24 months, enter 07/01/2024, to 06/30/2026.

### **Picture 2**

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8	<p style="color: red; font-size: small;">Additional information: By submitting the figures included in this budget, you certify this represents a good faith estimate of costs anticipated under this project and to which Carnegie Corporation of New York grant funds will be applied.</p>
9	<div style="border: 2px solid red; border-radius: 50%; padding: 10px; text-align: center;"> <p>Start: mm/dd/yyyy End: mm/dd/yyyy</p> </div>
	<p style="color: red; font-size: small;">If a grant is awarded, the funds must be used only for charitable purposes and cannot be used to fund overhead, dissertations, debt repayments, lobbying efforts, the purchase of</p>

**Institutional Support:** (Picture 3) In column C, fill in the funds that will be provided by your university or institution for each line item. The total will be automatically calculated and appear in “Grand Total”, column C. When you are finished, skip to worksheet tab 2, entitled “Salary.” (Note: all grey shading in the rows under columns B and C of the Summary page will autofill from the detail pages, tabs 2-5.)

**Picture 3**

Column A	Column B	Column C
Purpose	Requested <i>Carnegie</i> Funds	Support from your university (or other institution, in addition to Carnegie)
Salary & Fringe Benefits	\$0	\$25,000
Research Assistants	\$0	
Travel	\$0	\$3,000
Conferences	\$0	
OTHER (be specific, list each item)	\$0	
	\$0	
	\$0	
	\$0	
	\$0	
<b>GRAND TOTAL</b>	\$0	\$28,000

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**Salary:** On tab 2, please enter your name and title, your total annual salary and benefits, and the amount you are requesting from Carnegie Corporation in the boxes indicated, for each project year (Picture 4). The FTE or Full-Time Equivalency percentage will auto-fill. If you do not plan to use Carnegie funds to pay all or part of your salary, leave this page blank. The requested Carnegie funds will automatically populate on tab 1, the “Budget Summary” sheet. Please provide any additional information related to your salary, in the indicated area.

**Picture 4**

<b><u>Salary</u></b>						
<b>Detail Page</b>						
Please budget items requested from Carnegie Corporation only						
SALARY ITEMS: YOUR SALARY AND BENEFITS ALLOCATED TO PROPOSED PROJECT						
Your Name and Title:	Full Annual Salary	Requested <i>Carnegie</i> Salary Support	% FTE	Full Annual Benefits	Requested <i>Carnegie</i> Benefits Support	% FTE
	Year 1					
	\$0	\$0	#DIV/0!	\$0	\$0	#DIV/0!
	Year 2					
	\$0	\$0	#DIV/0!	\$0	\$0	#DIV/0!
					<b>Subtotal</b>	\$0
Additional Information:						

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**Research Assistants:** On worksheet 3, please fill in the name, title, rate of pay, and anticipated hours for each research assistant you plan to hire in each project year (Picture 5). Research Assistants may also be research associates and post-doctoral assistants. The total pay will automatically calculate and fill in on the subtotal line as well as on tab 1, the “Budget Summary” sheet. If your assistant will be paid in a lump sum, not by the hour, fill in the amount under columns E and/or H, “Total requested from Carnegie.” *Please provide an explanation of how the hourly rate or lump sum was determined, in the area provided.* If you do not plan to hire research assistants, leave this page blank. Note: Collaborators should be listed under the “Other” tab and on the “Budget Summary” tab along with the amount of fellowship funds that will go to that individual. Please do not list their payment as a ‘sub-award for co-PI’, etc. to them or to their institution, as the fellow will be solely responsible for providing payment to the collaborator.

**Picture 5**

Name (if known) & Position	Rate of Pay/Hr	Number of hours	Total requested from Carnegie
Ex. Ken Jones Lab Assistant	\$25	100	\$2,500
	\$0		\$0
	\$0		\$0
	\$0		\$0
	\$0		\$0
	\$0		\$0
	\$0		\$0
	\$0		\$0
	\$0		\$0
	\$0		\$0
		Subtotal	\$2,500

Please explain how Research Assistants' wages were determined. Is there a standard hourly rate or lump sum?

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**Travel:** On worksheet 4, please indicate the trips you intend to take over the length of your fellowship (Picture 6). For each trip, please enter the purpose, people travelling, location, dates and the total amount requested. If you are not yet sure of your destination, please include as much information as possible in the area beneath the chart. For example, under 'Location' you can type, "Las Vegas or Dallas" or "a city in the continental United States." In our original budget template, this tab required a more detailed breakdown. In this new template, we are asking for an aggregated amount for each trip. In other words, please include flight or rail costs, hotel, local transportation, per diem, etc. for all travelers. Please explain how your travel relates to the project in the area indicated.

### Picture 6

7					
8	<b>Purpose</b>	<b>Who is traveling?</b>	<b>Location(s)</b>	<b>Dates</b>	<b>Total requested from Carnegie</b>
9	Ex. Research at archives	myself and RA (Candace Smith)	Dallas, TX	6/14/25 - 6/20/25	\$3,000
10					
11	APSA Conference	me	Seattle, WA	7/6/25-7/8/25	\$1,100
12					
13					\$0
14					
15					\$0
16					
17					\$0
18					
19					\$0
20					
21					\$0
22					
23					\$0
24					
25				<b>Subtotal</b>	<b>\$4,100</b>
26					
27	<b>Please explain how your travel relates to the project and any additional explanation necessary.</b>				
28					
29					

**Please specify if you plan to travel to countries outside the United States.** Carnegie Corporation is prohibited by law from funding travel to certain regions. A complete list may be found on the lease note that the Corporation does not fund business class travel. If you do not plan to travel, leave this page blank. Please note that the Corporation does not fund business class travel. If you do not plan to travel, leave this page blank.

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**Conferences:** On tab 5, please enter the conferences you plan to organize or attend during your fellowship (Picture 7). Please indicate the purpose, who is attending (anyone who will be using Carnegie funds), location, dates, and the total requested for the conference. As with the Travel tab, please aggregate your costs for each conference/meeting. The subtotal will calculate automatically in column E and in the appropriate row on the “Budget Summary” page. If you are organizing a conference, please include the meeting facility under “Location”. 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

include meeting facility, anticipated number of attendees and expected costs.

- Identify target audiences.
- The Corporation expects Fellows to find economical fares for all travel - No Business Class.

Meeting/Purpose	Who is attending and approximate #'s	Location(s)	Dates	Total requested from Carnegie
Ex. Washington Conference on Democratic Values	myself	Washington, D.C.	10/2/24 - 10/4/24	\$800
Los Angeles County voter registration meeting	myself, collaborators from UCLA political science dept., 200 election administrators	Los Angeles, CA	10/15/2024	\$3,500
				\$0
				\$0
				\$0
				\$0
				\$0
				\$0
				\$0
				\$0
			Subtotal	\$4,300

**Please explain how your attendance relates to the project and any additional explanation necessary.**

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**Other:** On worksheet 6, entitled “Other,” please explain any expenses that fall outside the provided budget areas. 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.” Please keep in mind that per IRS regulations, the Corporation does NOT fund overhead, dissertations, debt repayments, lobbying efforts, the purchase of equipment, or rent. *Note: There is no autofill for this section on the Summary page. Please enter these costs manually on that page.*