**GENERAL INSTRUCTIONS FOR IELCE CLASS PLAN AND BUDGET WORKBOOK**

**IMPORTANT NOTE**: These worksheets are designed for digital use. They are not formatted for printing.

Each proposed IET and IELCE must include a separate workbook that includes (1) a class plan, (2) a budget narrative, and (3) a match narrative that must be completed using this Excel workbook. For those unfamiliar with Excel, worksheets (designated by tabs at the bottom of the page) are organized by rows, columns and cells (also referred to as fields throughout this document). You will move from worksheet to worksheet (tab to tab) completing all required fields on each row by entering the requested information identified by the header of each column.

Highlighted columns contain **read-only fields** that will calculate automatically. Be aware that the worksheets contain formulas.

If, for example, an applicant were applying for IELCE funding, the worksheets listed below would need to be completed:

1. Class Plan (IELCE):
2. Budget Narrative (IELCE\_B)
3. Match Budget Narrative (IELCE\_MB)

Please note that the class plan cost and the budget narrative costs must be the same.

**NOTE:**  Once you have completed and saved this workbook, upload it to **online application portal** along with the other sections of the RFP.

**KEY DEFINITIONS**

**Administrative Cost**

Administrative costs are expenses incurred in the day-to-day operations of an organization as a whole, as opposed to expenses that can be directly tied to student services. Examples of administrative costs include, but are not limited to:

1. Salary and fringe of administrative staff and support staff
2. Property management expenses such as rent, maintenance, and utilities
3. Other expenses such as insurance, advertising, and office supplies

**Worksheet Instructions**

These instructions will assist you in completing all of the required worksheets, including match.

**Part I: Class Plan**

**Purpose**

The IET or IELCE class plan supports the proposed program design by illustrating the program’s strategy to provide adult education instruction concurrently with workforce preparation activities and workforce training at a reasonable cost.

**Organization**

Each individual class will be entered on a separate row designated by a class code that is automatically generated.

**How to Complete the Worksheet**

To enter information into a cell, you must first select (click on) the cell. The cell will become highlighted once it is selected. You can now type in your data.

**Column A: Class Code**

This column is **read-only**. The codes for each class have been automatically generated.

**Column B: SPL**

Enter the grade level range for which the class is designed.

**Column C: Number of Seats**

In each cell, enter the proposed number of active and unique students to be enrolled in each class at any given time. The total number of seats will auto-calculate in cell C3 (yellow).

**Column D: Notes**

Please identify the adult education, workforce preparation activities, workforce training, and, if proposing IELCE, the Civics Education classes. If workforce preparation activities and/or Civics Education is embedded in another class, please identify the class.

**Column E: Hours per Week**

Enter the total proposed number of hours the class will run each week.

**Column F: Weeks per Year**

Enter the total proposed number of weeks the class will run throughout the year.

**Column G: Hours per Year**

This column is **read-only**. It will automatically calculate based on the information provided in columns F and G.

**Column H: Cost per Seat**

Enter the amount you have determined it will cost to fill one seat in this class for one year.

**Column I: Class Cost**

This column is **read-only**. It will automatically calculate the cost of each class based on the number of seats proposed and the cost of each seat. The total cost of all classes will appear in cell I3.

**Worksheet Instructions**

**Part 2: Budget Narrative**

**Purpose**

The budget and accompanying narrative provide details outlining exactly how an applicant will spend the requested grant funds line item by line item. It ensures that your costs are within the grant range, are reasonable and well thought out. It also describes other sources of funding (match) that support the program’s capacity to provide the proposed services.

***Organization***

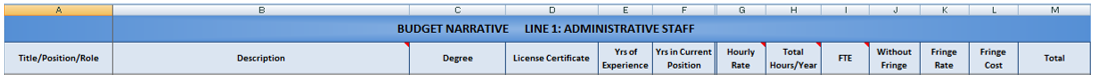
The budget narrative is divided into 10 parts:

* Line item 1 – Administrative Staff
* Line item 2 – Professional Staff
* Line item 3 – Support Staff
* Line item 4 – Fringe
* Line item 5 – Contractual Services
* Line item 6 – Supplies
* Line item 7 – Travel
* Line 8 – Other
* Line 9 – Indirect
* Line 10 – Equipment

**How to Complete the Worksheets**

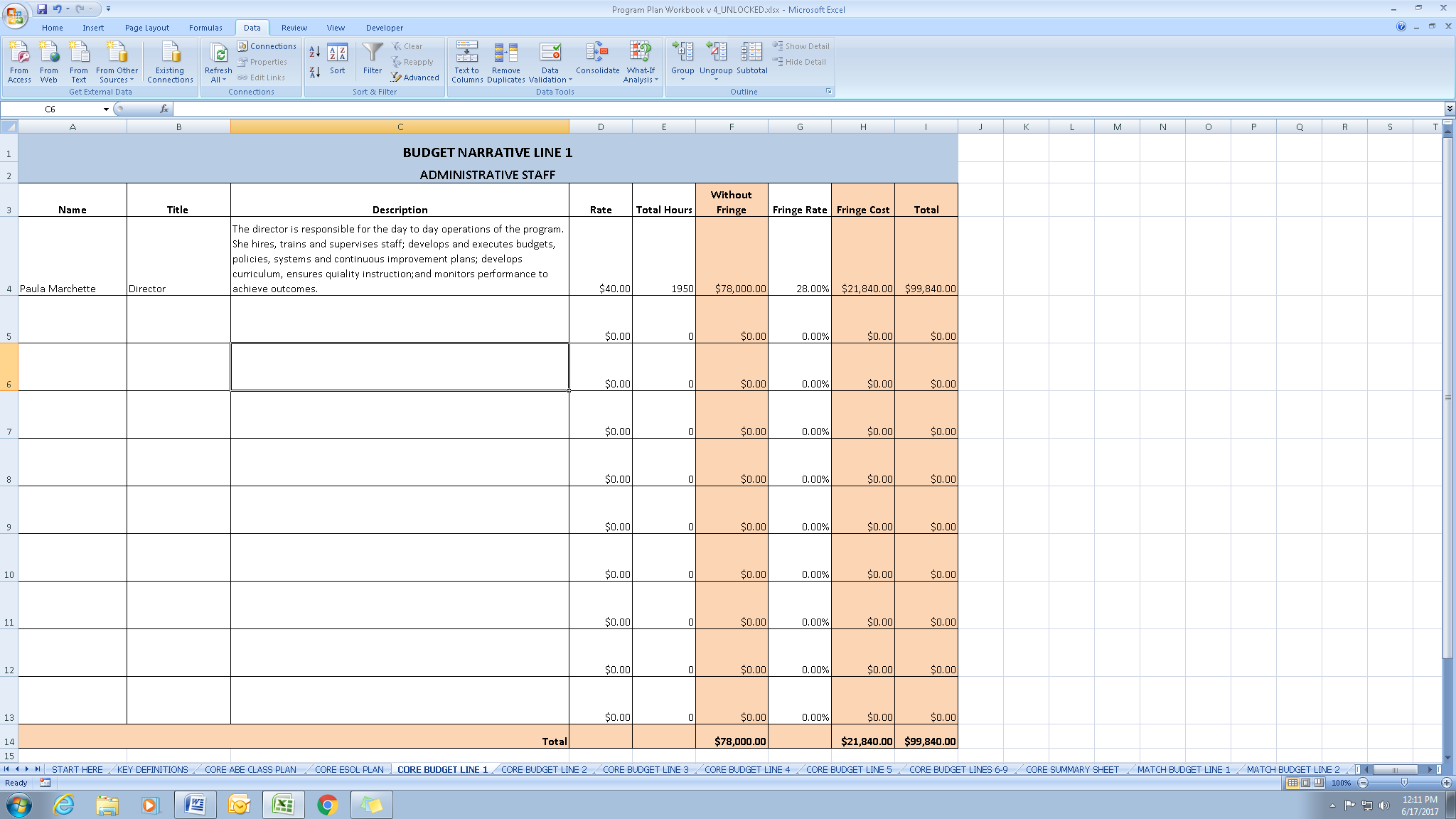
**Tab L1: Administrative Staff**

Administrative staff are those individuals whose primary responsibility is to provide leadership by directing and managing the day-to-day operational systems of the program, e.g., director, coordinator, principal, etc. All administrative staff that support your program need to be listed on this worksheet. There are 13 required cells to be completed for this line item.



**Column A: Title**

Enter the title of the position each administrator holds (e.g., director, coordinator, principal). All administrators whose salary (or portion thereof) will be charged to this grant must be entered on this line item.



**Column B: Description**

Write a brief description of the duties this individual performs in relation to managing the AE program.

**Column C: Degree**

Enter the highest academic degree each administrator holds and the area of concentration. For example, *Master’s in Educational Leadership*

**Column D: License/Certificate**

Enter any licenses and/or certificates each administrator has been awarded relevant to supporting the AE program. For example, *K-12 Special Education Administrator; certificate in Educational Technology*

**Column E: Years of Experience**

Enter the number of years of experience each administrator has in the field of adult education.

**Column F: Years in Current Position**

Enter the number of years each administrator has served in his/her current position.

**Column G: Hourly Rate**

Enter the hourly salary rate being charged to this grant for each administrator.

**Column H: Total Hours**

Some administrators are responsible for multiple programs within an agency. Enter only the number of hours this staff member will dedicate to directly supporting the AE program.

**Column I: FTE**

Calculate the Full Time Equivalent by taking the number of hours allocated to the grant for each position and then dividing by the number of hours constituting a full-time position at your organization.

For example, if full-time at your organization is 37.5 hours a week for 52 weeks, the total hours would equal 1950. An administrator dedicating 1950 hours/year to this grant would have an FTE of 1.0. An administrator working 1040 hours on this grant would have an FTE of .53 (1040 divided by 1950).

**Column J: Without Fringe**

This is a **read-only** column that will calculate the salary for each position when no fringe is applied.

**Column K: Fringe Rate**

If the salary for the position includes fringe, enter the percentage that will be charged to this grant.

**Column L: Fringe Cost**

This is a **read-only** column that will calculate the total cost of fringe benefits for each position.

**Column M: Total**

This is a **read-only** cell that will calculate the total salary for each position including fringe.

**L2: Professional Staff**

Professional staff are those individuals whose primary responsibility is to provide direct services to the students, e.g., teachers, advisors, etc. All professional staff being charged to this grant must be listed on this worksheet. In addition to the same 13 columns required on L1, two additional pieces of information are needed for teaching positions:

In **Column G**, enter the subjects/content each instructor will teach relevant to the classes charged to this grant. In **Column H**, identify the level(s) each teacher will instruct using SPLs or GLEs.

**Worksheet Instructions**

**Budget Narrative continued**

**L3: Support Staff**

Support staff are those individuals whose primary responsibility is to provide administrative assistance to the program (e.g., data entry specialist, receptionist). All support staff being charged to this grant must be listed on this worksheet. The required information is the same as that on L1.

**L4: Fringe**

This worksheet is **read-only**. The costs of fringe benefits for all staff are automatically calculated based on the data you provide on L1, L2 and L3.

**L5: Contractual Services**

Contractors are typically self-employed individuals, independent of the agency, who agree to provide a specific service to the program at a specific hourly rate for a specific period of time, e.g., substitute teacher, curriculum developer, and computer consultant. All contractors that support your program need to be listed on this worksheet. There are five required columns to be completed:

**Column A: Type**

Enter a category or title identifying the type of contractor being charged to the grant. For example, Fiscal; Technology; Instruction

**Column B: Description**

Enter a detailed description of the services each contractor will provide to the AE program. For example, *Technology – a computer specialist trains staff in basic computer skills and educational digital tools. This contractor also supports staff in integrating technologies into instruction to improve digital literacy.*

**Column C: Hourly Rate**

Enter the rate per hour being charged to this grant to compensate each contractor.

**Column D: Total Hours**

Enter only the number of hours the contractor will dedicate to the AE program.

**Column E: Total**

This is a **read-only** column that will automatically calculate the total fee for the services provided by the contractor.

**Line Item 6: Supplies and Materials**

This line item is divided into three categories:

* *instructional supplies* – enter a detailed description of materials proposed for purchase that are essential to the learning process and used by the teachers and students in or outside the classroom (i.e. books).
* *instructional technology* – enter a description of digital materials you anticipate purchasing, including software, that aid in the development, delivery and evaluation of instruction (i.e. Aztec’s College Ready).
* *non-instructional supplies* – enter a description of the office materials you propose to purchase that will be used for the day to day administration of the program (i.e. paper, tape, binder clips).

**Line Item 7: Travel**

Like line item 6, travel is divided into categories to distinguish between the travel that is considered an administrative cost, travel that is not. The categories are:

* *administrative travel* – enter a detailed description of all proposed travel expenses of the administrators identified on line 1
* *professional travel* - all anticipated travel expenses of the staff listed on line item 2
* *support staff travel* - all proposed travel expenses for the staff listed on line item 3

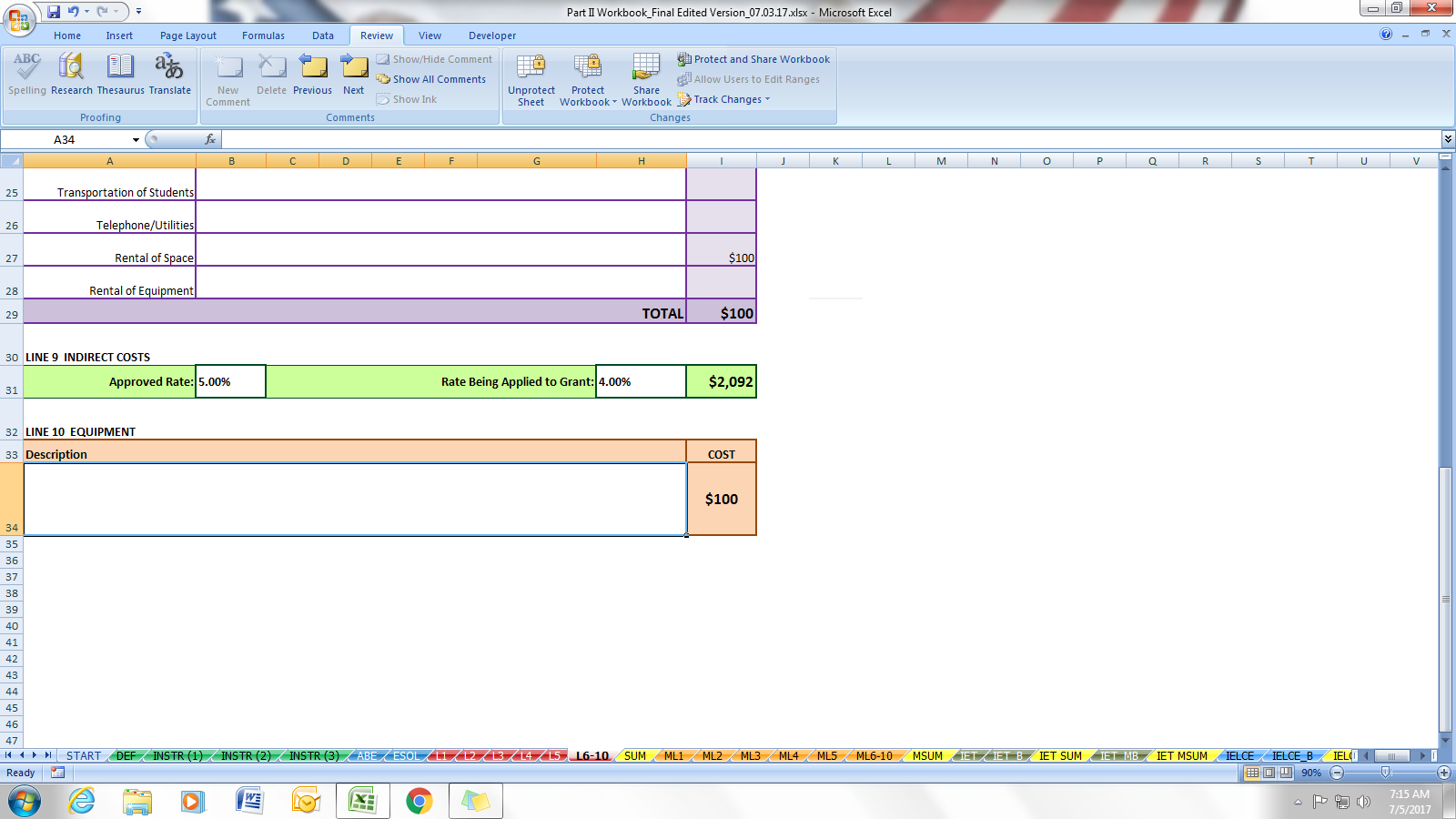
**Line Item 8: Other**

If you anticipate charging overhead expenses to this grant, enter a detailed description in the appropriate categories listed under line 8.

**Line Item 9: Indirect Costs**

These costs are the expenses of doing business that are incurred in joint usage and therefore difficult to directly charge to one particular funding source. Examples of indirect costs include rent, telephone expenses, utilities, and accounting services. Applicants must apply to and be approved by the state before claiming indirect.

If claiming indirect, enter your approved rate and the rate being charged to the grant which can be the same or lower than the approved rate but never higher.



**Line Item 10: Equipment**

Individual pieces of equipment costing $5,000 or more are listed here.