

Budget guidelines

[SHIFT Funding and Support Programs](#)

Because social transformation projects come in all kinds of shapes and sizes, we receive applications from a wide diversity of projects. With this in mind, we recognize there are also a wide range of budgetary needs.

We trust that the members of the project team are the best placed to know what expenses they must incur for their project to succeed. As such, we have not prepared a list of eligible and ineligible expenses. However, please note that all expenses related to drugs and alcohol are considered ineligible.

Budgets are estimates

Project budgets are by their nature based on your best guess of how your project will go and how much things will cost. We anticipate that the actual expenses incurred by your team will be somewhat different than what is listed in your application, however we encourage you to be as realistic and accurate as possible in preparing your budget. The main goal of requesting a budget is to help our selection jury better understand your project.

In addition to outlining your anticipated expenses, your project budget should also include a list of your anticipated revenue or funding sources. You are allowed to have additional funding sources other than SHIFT, but this is not a requirement. For other grants or awards, we ask that you indicate the current status of this funding (pending/approved/declined) directly in your budget.

Frequently asked money-related questions

- **I've never made a budget before – can someone help me?**
 - Yes! To help applicants with their budget we've created an [optional budget template](#) that you can use as well as list of common expenses that you are welcome to use as a reference. Please see below. You are also welcome to book an appointment during our office hours and a SHIFT staff member will be happy to help you build or review your budget.
- **Is it okay if I submit the project budget I already have on file or do I have to make a budget exclusively for the funding I am requesting from SHIFT?**
 - You are welcome to submit your full project budget or a grant specific budget depending on what is easier for you. We would suggest picking the option that is most aligned with the way your project is described in the application form and that will be most illuminating of the picture you are painting for the selection jury.
 - If you are applying for a small amount of money (e.g. \$5,000) and your full project budget is much larger (e.g. \$500,000), we would suggest providing a bit of additional context for the benefit of the Selection Jury. For example, it would be helpful for them to know whether or not you have already secured the other

funding required for your project to succeed and, if yes, why this additional amount is important even though it represents such a small percentage of your total budget.

- **Are there any restrictions on how to spend the funding received from SHIFT?**
 - Not really. We trust that you know best what expenses you need to incur in order for your project to succeed. The only officially ineligible expenses are the purchase of drugs and alcohol.
- **Can I use part of this funding to pay team members for their work on the project?**
 - Yes, absolutely! Labour is an important part of socially transformative work and we are happy to support projects in paying people for the time they invest.
- **How will I receive the funding that is awarded to my project?**
 - Our preference is to give the funding awarded to projects in a lump sum, either via an internal transfer to a Concordia account or a cheque to an external organization. For informal groups that do not have access to an organizational account, we can either write a cheque to an individual or manage the funds internally at SHIFT.
 - Please note that cheques written to individuals will be tied to that person's SIN number and may have tax implications. Funds that are managed by SHIFT will be disbursed over the course of the project via invoices, expense claims and honorariums, all of which will be subject to Concordia's financial processes.
- **If my project is selected to receive funding, how long will it take for us to receive the money?**
 - Once our selection jury agrees on a project to fund, we will organize a first meeting with members of the project team to review our funding agreement. After this meeting, once all the necessary information is received (SIN/NEQ, mailing address, etc.) it will take 6 - 8 weeks for Concordia to issue a cheque.

Examples of some potential expenses

For project teams who may be less familiar with estimating costs, we've prepared a non-exhaustive list of some of the expenses we could imagine seeing included in project budgets. Where possible, we've included estimates and/or links to relevant reference documents.

- Wages and benefits for project staff
 - We recommend referring to the [pay rates outlined by the TRAC union](#).
- Honorariums for community partners
 - We recommend \$30 - \$50 per hour for consultation work
 - Alternatively, teams partnering with community organizations are encouraged to include a meaningful financial contribution to the organization in their budget, in proportion to the contribution that the organization's labour, knowledge and relationships will make to the project's success.
- Elder related costs (speaking fees, per diems, transportation , etc.)
 - We recommend referring to Concordia's [Indigenous Elder and Community Protocol](#) (p. 9)
- Accessibility related costs (ASL/LSQ interpreters, attendants, braille printing, etc.)
 - We recommend referring to Concordia's [Inclusive Innovation Guide](#) (p. 19)

- Catering
 - Costs vary by caterer, but we recommend using the following estimates:
 - Snack: ~\$7/person
 - Breakfast: ~\$10/person
 - Lunch: ~\$13/person
 - Dinner: ~\$18/person
- Per diems
 - Concordia uses the following per diem rates:
 - Breakfast: \$10/person
 - Lunch: \$16/person
 - Dinner: \$28/person
 - Mileage: \$0.49\$/kilometer
- Space rental costs
- Professional fees (consultants, facilitators, designers, accountants, coaches, etc.)
- Supplies and materials
- Equipment and technology