

PolicyEngine Organization Budget 2026-2027

Response to PBIF Requirement: Two-Year Organizational Budget

Summary

This document provides PolicyEngine’s complete organizational budget for 2026 and 2027, showing that the PBIF Atlas grant will represent **22% of 2026 revenue** and **19% of 2027 revenue**, with clearly identified alternative funding sources ensuring organizational sustainability.

Historical Growth Validates Projections

Proven Track Record (2022-2025)

Year	Annual Revenue	Growth Rate	Key Milestones
2022	\$0	Founded	Organization launched
2023	\$350,000	New org	Initial grants secured
2024	\$650,000	86%	Major foundation support
2025	\$976,000	50%	Diversified revenue streams
3-Year CAGR		∞%	Zero to ~\$1M

This historical performance demonstrates: - **Consistent execution** on fundraising and delivery - **Accelerating adoption** by partners and funders - **Proven ability** to scale operations efficiently - **Market validation** of PolicyEngine’s value proposition

Our 2026-2027 projections of 68% and 15% growth are conservative compared to our 2023-2025 average of 70% annual growth.

Revenue Projections

2025 Budget (Current Year - Baseline)

Revenue Source	Amount	Status
Arnold Ventures	\$270,000	Active (partial year)
NSF Grant	\$100,000	Active (partial year)
NEO Philanthropy	\$150,000	Active
MyFriendBen Contracts	\$80,000	Active
Benefit Navigator Contracts	\$60,000	Active
Georgetown/USC Research	\$16,000	Active
Gerald Huff Fund	\$50,000	Active
PolicyEngine UK Shared Resources	\$100,000	Active
API Revenue & Other	\$150,000	Active
Total 2025 Revenue	\$976,000	

2026 Budget Projection

Revenue Source	Amount	Status
Continuing Revenue		
NEO Philanthropy	\$150,000	Renewal expected
MyFriendBen Contracts	\$100,000	Expanded
Benefit Navigator Contracts	\$80,000	Expanded
Georgetown/USC Research	\$16,000	Continuing
Gerald Huff Fund	\$50,000	Continuing
PolicyEngine UK Shared Resources	\$120,000	Growing
API Revenue & Other	\$200,000	Growing

Revenue Source	Amount	Status
New/Expanded Grants		
NSF Grant (Year 2)	\$200,000	Confirmed
Arnold Ventures (Full Year)	\$180,000	Confirmed (2/3 of \$270k)
MyFriendBen New Grant	\$100,000	Confirmed
PBIF Atlas Grant (Year 1)	\$364,454	Pending approval
Other Pipeline Grants	\$119,546	In negotiation
Total 2026 Revenue	\$1,680,000	72% growth

2027 Budget Projection

Revenue Source	Amount	Status
Core Operations		
Foundation Grants (Various)	\$450,000	Portfolio approach
Government Contracts	\$350,000	Federal/state
Partner Contracts	\$300,000	MFB, BN, others
Research Partnerships	\$150,000	Universities
PolicyEngine UK Shared Resources	\$150,000	Established
API & Enterprise Revenue	\$250,000	Growing
Atlas-Related Revenue		
PBIF Atlas Grant (Year 2)	\$364,454	Pending approval
Atlas Enterprise Support	\$50,000	New revenue stream
Atlas Government Contracts	\$100,000	Projected
Other Growth	\$167,546	Conservative estimate
Total 2027 Revenue	\$1,932,000	15% growth

Expense Projections

2026 Operating Budget

Category	Amount	% of Budget	Notes
Personnel			
Core Team (8 FTE)	\$960,000	57.1%	Salaries + benefits
Atlas Team (1.3 FTE)	\$194,000	11.5%	PBIF-funded positions
Total Personnel	\$1,154,000	68.7%	
Program Costs			
Cloud Infrastructure	\$80,000	4.8%	GCP, AWS
Software & APIs	\$60,000	3.6%	Development tools
Research & Data	\$50,000	3.0%	Datasets, analysis
Partner Subgrants	\$80,000	4.8%	Atlas partners
Operations			
Office & Admin	\$40,000	2.4%	Remote-first
Professional Services	\$35,000	2.1%	Legal, accounting
Travel & Conferences	\$25,000	1.5%	Team & outreach
Marketing & Comms	\$20,000	1.2%	
Reserve & Indirect			
Operating Reserve	\$84,000	5.0%	5% of revenue
Indirect Costs	\$52,000	3.1%	Fiscal sponsor
Total 2026 Expenses	\$1,680,000	100%	Balanced budget

2027 Operating Budget

Category	Amount	% of Budget	Notes
Personnel			
Core Team (9 FTE)	\$1,100,000	56.9%	Modest growth
Atlas Team (1.3 FTE)	\$200,000	10.4%	Sustained effort
Total Personnel	\$1,300,000	67.3%	
Program Costs			
Cloud Infrastructure	\$95,000	4.9%	Scaled operations
Software & APIs	\$70,000	3.6%	Enhanced tools
Research & Data	\$60,000	3.1%	Expanded coverage
Partner Subgrants	\$85,000	4.4%	Continued support
Operations			
Office & Admin	\$45,000	2.3%	
Professional Services	\$40,000	2.1%	
Travel & Conferences	\$30,000	1.6%	
Marketing & Comms	\$25,000	1.3%	
Reserve & Indirect			
Operating Reserve	\$97,000	5.0%	5% of revenue
Indirect Costs	\$85,000	4.4%	
Total 2027 Expenses	\$1,932,000	100%	Balanced budget

Financial Sustainability Indicators

Funding Diversification

- **No single funder exceeds 25% of budget** by 2027
- **Seven distinct revenue categories** ensuring stability
- **50/50 split** between grants and earned revenue by 2027

PBIF Grant Impact Analysis

The PBIF Atlas grant of \$728,907 over two years (\$364,454 annually) will support:

2026 Coverage (22% of total budget)

- 100% of Atlas-specific personnel (1.3 FTE): \$194,000
- 100% of Atlas partner subgrants: \$80,000
- Portion of cloud infrastructure for Atlas: \$40,000
- Atlas-related travel and operations: \$50,454
- **Total PBIF support in 2026: \$364,454 of \$1,680,000 (21.7%)**

2027 Coverage (19% of total budget)

- Continued Atlas team support: \$200,000
- Partner subgrants and bounties: \$85,000
- Infrastructure and operations: \$79,454
- **Total PBIF support in 2027: \$364,454 of \$1,932,000 (18.9%)**

Other Confirmed Funding Sources (Non-PBIF)

2026 Other Revenue: \$1,315,546 (78% of budget)

- **NSF Grant:** \$200,000 (confirmed, Year 2 of \$300k grant)
- **Arnold Ventures:** \$180,000 (confirmed, continuing support)
- **MyFriendBen Grant:** \$100,000 (confirmed, new)
- **NEO Philanthropy:** \$150,000 (renewal expected)
- **Partner Contracts:** \$180,000 (MFB, Benefit Navigator)
- **Research Partnerships:** \$50,000 (Georgetown, USC)
- **PolicyEngine UK:** \$120,000 (shared resources)

- **API & Enterprise:** \$200,000 (growing revenue)
- **Other Sources:** \$135,546 (Gerald Huff Fund, pipeline grants)

2027 Other Revenue: \$1,567,546 (81% of budget)

- Foundation portfolio approach with multiple funders
- Growing enterprise and government contracts
- Established partner network generating recurring revenue
- International collaboration providing stability

Key Metrics

Metric	2025	2026	2027
Total Revenue	\$976k	\$1.68M	\$1.93M
Year-over-Year Growth	50%	72%	15%
Personnel as % of Budget	70%	69%	67%
Operating Reserve	\$50k	\$84k	\$97k
Funding Sources	8	12+	15+
PBIF Grant Amount	\$0	\$364,454	\$364,454
PBIF as % of Total	0%	21.7%	18.9%
Other Funding	\$976k	\$1.32M	\$1.57M
Other as % of Total	100%	78.3%	81.1%

Risk Mitigation

1. **Multiple Revenue Streams:** No dependency on single source
2. **Confirmed Funding:** \$480k already secured for 2026 (NSF, MFB, AV)
3. **Growing Earned Revenue:** API and enterprise services scaling
4. **International Collaboration:** UK operations provide stability
5. **Operating Reserve:** Building to 10% of annual budget

Atlas Sustainability Beyond PBIF

By 2028, PolicyEngine Atlas will be self-sustaining through: - **Enterprise Support Contracts:** \$150k+ annually
 - **Government Integration Services:** \$200k+ annually
 - **API Revenue:** Usage-based pricing for commercial users - **Foundation Support:** Continued interest in infrastructure - **Partner Contributions:** Shared maintenance costs

Conclusion

PolicyEngine's financial projections demonstrate robust growth and diversification. The PBIF Atlas grant accelerates our impact while representing only 22% of 2026 revenue, ensuring the project's sustainability regardless of future PBIF funding. Our proven track record of growing from \$0 to \$1M in three years, combined with \$480k in confirmed new grants for 2026, validates our ability to build and maintain critical infrastructure for the benefit delivery ecosystem.

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