

Learning Objectives

After this training, you should:

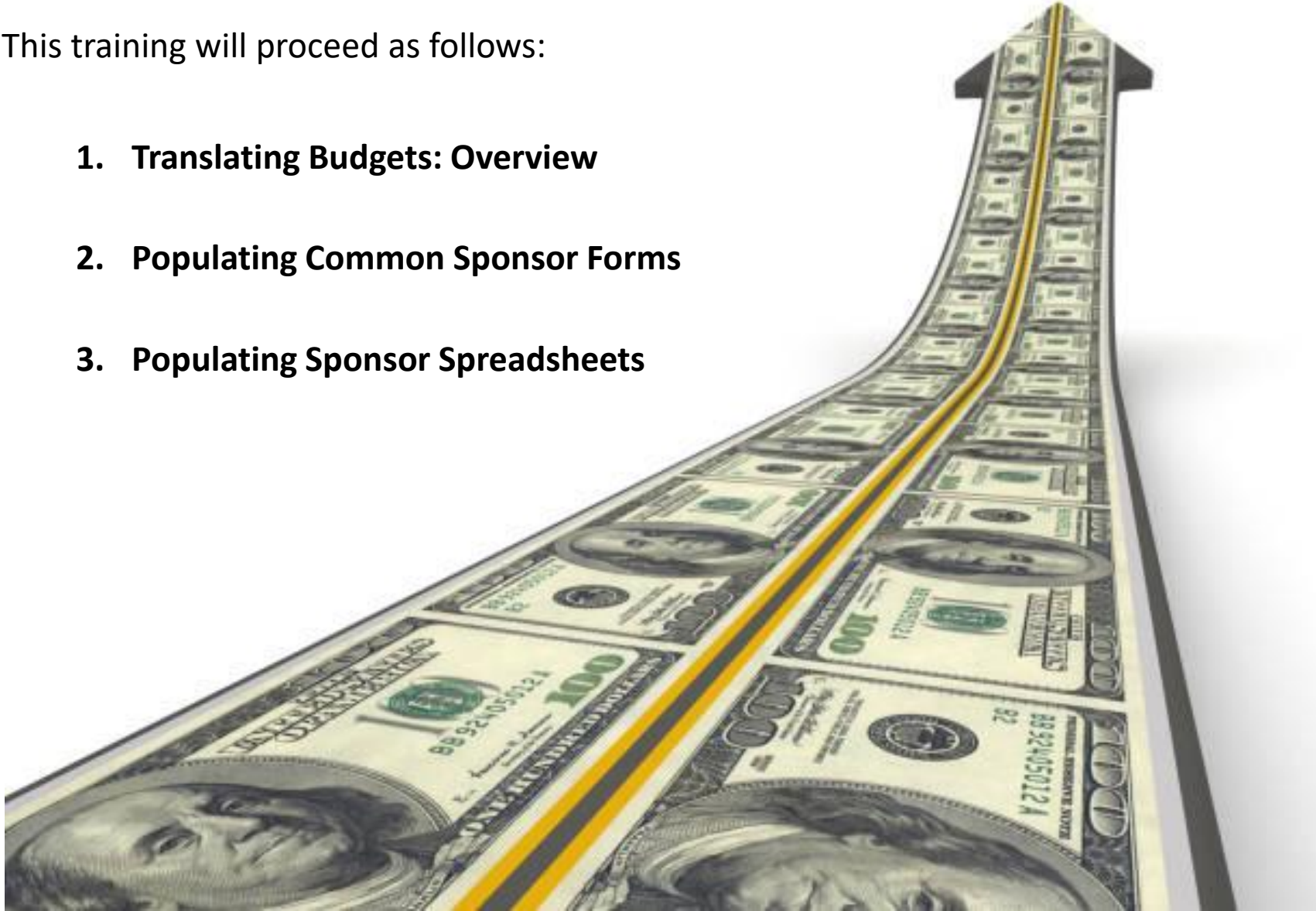
1. Know helpful concepts that facilitate translating an OR Budget Template into commonly-used sponsor budget forms.
 - i.e., Cayuse 424, Research.gov (NSF), NSPIRES (NASA), FFAST (State of California), etc.
2. Know tips and tricks that aid in translating an OR Budget Template into sponsor-required Excel spreadsheets.
 - i.e., Michael J. Fox Foundation, DARPA, etc.



Training Modules

This training will proceed as follows:

- 1. Translating Budgets: Overview**
- 2. Populating Common Sponsor Forms**
- 3. Populating Sponsor Spreadsheets**



Translating Budgets: Overview

Translation, not reinvention
(in most cases)

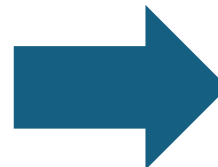


Why this Matters

Internal budget (OR Budget Template)

Consistent for approvals and compliance

Proposed:	Awarded:	NIH		Title:	Malaria Project with UK	Proposal Due Date:					7/18/2026						
Start Date:	10/1/2026	End Date:	9/30/2029	PI(s):	LB. Jeffries <th>12 Months</th> <th>12 Months</th> <th>12 Months</th> <th>0 Months</th> <th>0 Months</th> <th>36 Months</th>	12 Months	12 Months	12 Months	0 Months	0 Months	36 Months						
Change estimates based on awarded dates?		Yes	Notes:														
Personnel		Enter effort either in Person Months (top section) or % Time (bottom section)															
Name/Role:	Appt. Type	Effort Type	Base Salary	Months or %:	Person Months					Escalation:	Multi						
1 LB Jeffries - PI (SMR)	9/12	SMR	133,620	Months	Per 1	Per 2	Per 3	Per 4	Per 5	Escal	Total						
2 Bakshi - Co-PI	11/12	AY	122,000	Months	0.50	0.50	0.50				10/1/26-9/30/27	10/1/27-9/30/28	10/1/28-9/30/29	10/1/26-9/30/29			
Personnel by %		% Time or Effort															
1 LB Jeffries - PI (AY)	9/12	AY	133,620	%	20.0%	20.0%	20.0%				3%	26,724	27,526	28,351	0	0	82,601
2 Doyle - Postdoc	12/12	CAL	66,737	%	50.0%	50.0%	50.0%				3%	33,369	34,370	35,401	0	0	103,140
3 GSR - TBD	12/12	CAL	80,260	%	62.5%	62.5%	62.5%				3%	50,163	51,667	53,217	0	0	155,047
Total Salaries												130,648	134,622	138,718	0	0	403,988
Benefits by Person		UCPath CBR Group	FT Split:	9/3	9/3	9/3	0/0	0/0	Escalations to fringe?					Yes			
1 LB Jeffries - PI (SMR)	Faculty Summer		%	%	%	%	%		Period 1	Period 2	Period 3	Period 4	Period 5	Total			
2 Bakshi - Co-PI	Faculty, Acad. MSP, Safety		10.6	10.9	11.2				1,574	1,667	1,764	0	0	5,005			
1 LB Jeffries - PI (AY)	Faculty, Acad. MSP, Safety		41.6/42.8	42.8/44.1	44.1/45.4				2,323	2,487	2,665	0	0	7,475			
2 Doyle - Postdoc	Postdoc Employees		11.197	11,871	12,595	0	0		8,509	9,039	9,594	0	0	27,142			
3 GSR - TBD	Grad and Undergrad		915	995	1,078	0	0		24,518	26,059	27,696	0	0	78,273			
Total Benefits												155,166	160,681	166,414	0	0	482,261
OTHER DIRECT COSTS																	
Subaward Costs		Subaward Type	Period 1	Period 2	Period 3	Period 4	Period 5	Total									
Stanford University		Non-UC	90,000	90,000	90,000			270,000									
Stanford University - F&A		IC of Above	55,800	55,800	55,800			167,400									
Total Subaward Costs												145,800	145,800	145,800	0	0	437,400
Total Subaward Indirect Costs:												\$55,800	\$55,800	\$55,800	\$0	\$0	\$167,400
GSR Tuition/Fees		Esc/Rates	P1	P2	P3	P4	P5	Academic Year Rate Split:									
Available Tuition Months (based on project dates):		AY	9	9	9	0	0	9/0	9/0	9/0	0/0	0/0	Total				
Name or Notes	Use Buydown	Rates	#GSRs	#GSRs	#GSRs	#GSRs	#GSRs	29,013	31,914	35,105	0	0	96,032				
Resident	10%	23,502						0	0	0	0	0	0				
Resident	10%	23,502						0	0	0	0	0	0				
GSR III TBD	Non-Resident	10%	38,684	1	1	1		29,013	31,914	35,105	0	0	96,032				
Non-Resident	10%	38,684						0	0	0	0	0	0				
IRB Fees		Recharge Type (Choose)	UC?	S/per	P1	P2	P3	P4	P5	# per Period							
Site Name or Notes					2,974	1,620	1,620	0	0	0	0	0	6,214				



Your job: bridge the two

External budgets

Sponsor-specific, mandatory, sometimes quirky

SECTION B - BUDGET CATEGORIES					
6. Object Class Categories	GRANT PROGRAM, FUNCTION OR ACTIVITY				Total (5)
	(1)	(2)	(3)	(4)	
a. Personnel	\$	\$	\$	\$	\$
b. Fringe Benefits					
c. Travel					
d. Equipment					
e. Supplies					
f. Contractual					
g. Construction					
h. Other					
i. Total Direct Charges (sum of 6a-6h)					\$
j. Indirect Charges					\$
k. TOTALS (sum of 6i and 6j)	\$	\$	\$	\$	\$
7. Program Income	\$	\$	\$	\$	\$

Sponsor Budget Formats



In the early stages of a proposal, it can save you budget preparation time if you do three things:

1. Discuss the Budget with the PI

- Make sure to obtain any materials needed to begin the budget development process.
 - I.e., the funding announcement, other sponsor guidelines, an outline of the proposed project.

2. Review Sponsor Guidelines

- Read the funding opportunity announcement to clarify requirements, such as:
 - What expenses are allowable?
 - Are there any costs that must be charged, such as travel to an annual meeting?
 - Are there costs that cannot be charged, such as PI salary?
 - Are there any maximums/funding limits (either total or by budget category)?
 - Are there restrictions to indirect cost rates or bases?
 - Example: 8% of personnel costs only

SPO's [Learn: Proposal Budgeting](#) page has helpful tools.

3. Review how the sponsor requires the budget be submitted

- If the format is unusual, especially if it's a required Excel spreadsheet, review the form/spreadsheet prior to preparing the internal budget.
 - Example: As seen later, DARPA requires that only 3/4s of **Meal and Incidental Expense (M&IE)** per diem be charged on the first and last day of travel.
 - Accommodating this requirement early can save you having to redo the travel budget.

Sponsor Budget Formats

Federal Sponsors

Accessed
in
Cayuse 424

- NIH, USDA/NIFA, AHRQ, CDC, CDMRP, DoD, DoE & FDA
- BLM, DoJ, EPA, HHS, HRSA, NOAA, SAMHSA & US FWS
- DoEd
- NSF
- NASA
- DARPA (and some others)

Budget Forms / Spreadsheets

- RR Budget, PHS 398 Modular Budget, or PHS 398 Training Budget forms
- SF424A Budget form
- ED-524 Budget form
- Budget(s) form in **Research.gov**
- Budget tab in **NSPIRES**
- Excel spreadsheets**

State Sponsors

- CDE, CDFW, CDFA, CDPR & SWRCB

Project Budget tab in **FAAST**

UC Office of the President

Project Budget tab in **SmartSimple**

Foundations & Private Industry

A wide range of formats including:

- **Proposal Central** forms
- **Excel spreadsheets**
- **Word templates**



smartsimple



Populating Common Sponsor Forms



Helpful Guidelines

1. **Register early** for required sponsor submission websites.
2. Map UCD budget categories to appropriate sponsor budget categories.
 - Watch for differences in terminology, thresholds and caps.
 - Example: **Equipment** threshold for sponsor is \$10k not \$5k
3. Use the OR Budget **Personnel Reference** tab to:
 - Translate % effort into **Person-Months**.
 - Combine effort entered on two rows/two formats.
4. **Other Personnel** categories are often tallied together.
5. **GSR Tuition & Fees** are often included under **Other**.

Cayuse 424



- Map the UCD budget categories to appropriate sponsor budget categories.
- Watch for differences in terminology, thresholds and caps.

OR Budget Templates

PERSONNEL
Total Salary/Benefits by Person
EQUIPMENT
Total Equipment
TRAVEL
Total Travel
PARTICIPANT/TRAINEE SUPPORT COSTS
Total Participant/Trainee Support Costs
OTHER DIRECT COSTS
Materials and Supplies
Publication Costs
Consultant Services
Subaward Costs
GSR Tuition/Fees
IRB Fees (Single IRB & Industry)
Primate Center Costs
Other Expenses
Total Other Direct Costs
INDIRECT COSTS
Indirect Cost Base(s)
Indirect Cost Rate(s)

RR Budget Form (Cayuse 424)

- Section A, Senior/Key Person
- Section B, Other Personnel
- Section C, Equipment
- Section D, Travel
 1. Domestic
 2. Foreign
- Section E, Participant/Trainee Support Costs
- Section F, Other Direct Costs
 1. Materials and Supplies
 2. Publication Costs
 3. Consultant Services
 4. ADP/Computer Services
 5. Subawards/Consortium/Contractual Costs
 6. Equipment or Facility Rental/User Fees
 7. Alterations and Renovations
 8. Other 1
- Section G, Direct Costs (A thru F)
- Section H, Indirect Costs
- Section I, Total Direct and Indirect Costs (G + H)
- Section J, Fee

Note: This training omits further instruction specific to Cayuse 424 as this is covered in SPO's **Cayuse 424** class

- [Instructor-led training over Zoom](#), next offered 12/4
- [eCourse](#)
- See the [Cayuse 424 Handbook](#) for detailed guidance on populating each 424 form.

Mapping Personnel

1. Be sure to combine totals for personnel entered on two rows (for Acad Year + Summer effort)
2. Add together multiples of a group.



Personnel		Escalation:					Multi
Name/Role:		Period 1	Period 2	Period 3	Period 4	Period 5	Total
		4/1/26-3/31/27	4/1/27-3/31/28	-	-	-	4/1/26-3/31/28
1	Harris Lewin - PI (AY)	88,889	91,555	0	0	0	180,444
2	Prasant Mohapatra - Co-PI	69,445	71,528	0	0	0	140,973
3	Nakul Btobi - Proj Sci	44,500	45,835	0	0	0	90,335
Personnel by %							
1	Harris Lewin - PI (SMR)	2,667	2,747	0	0	0	5,414
2	Anu Patel - Postdoc	17,000	17,510	0	0	0	34,510
3	TBD - GSR	14,250	14,678	0	0	0	28,928
4	TBD - GSR	14,250	14,678	0	0	0	28,928
Total Salaries		251,001	258,531	0	0	0	509,532
Escalations to fringe?							
		Period 1	Period 2	Period 3	Period 4	Period 5	Total
1	Harris Lewin - PI (AY)	36,711	38,911	0	0	0	75,622
2	Prasant Mohapatra - Co-PI	28,681	30,399	0	0	0	59,080
3	Nakul Btobi - Proj Sci	23,463	24,888	0	0	0	48,351
1	Harris Lewin - PI (SMR)	275	291	0	0	0	566
2	Anu Patel - Postdoc	4,271	4,535	0	0	0	8,806
3	TBD - GSR	253	275	0	0	0	528
4	TBD - GSR	253	275	0	0	0	528
Total Benefits		93,907	99,574	0	0	0	193,481
Total Personnel		344,908	358,105	0	0	0	703,013

Section	Year 1			Year 2			Total Funds Requested
	# Personnel	Months	Funds	# Personnel	Months	Funds	
A. Senior/Key Personnel [Manage]	4	17.18	\$205,501	4	17.18	\$211,665	\$417,166
Harris A Lewin (PI)	6	18	\$ 91,556	6	18	\$ 94,302	\$185,858
Prasant Mohapatra (co-PI)	5		\$ 69,445	5		\$ 71,528	\$140,973
Cheng-Hong CHI (Other Sr Personnel)	6		\$ 44,500	6		\$ 45,835	\$90,335
B. Other Personnel	3		\$45,500	3		\$46,866	\$92,366
Postdoctoral Scholars	1	3	\$ 17,000	1	3	\$ 17,510	\$34,510
Other Professionals	0	0.00	\$ 0	0	0.00	\$ 0	\$0
Graduate Students	2		\$ 28,500	2		\$ 29,356	\$57,856
Undergraduate Students	0		\$ 0	0		\$ 0	\$0
Administrative/Clerical	0		\$ 0	0		\$ 0	\$0
Other	0		\$ 0	0		\$ 0	\$0
Total Salaries and Wages for Senior/Key and Other Personnel (A-B)	Year 1 (A-B)		\$251,001	Year 2 (A-B)		\$258,531	\$509,532
C. Fringe Benefits			\$93,907			\$99,574	\$193,481
			\$ 93,907			\$ 99,574	
Total Salaries, Wages & Fringe Benefits (A-C)	Year 1 (A-C)		\$344,908	Year 2 (A-C)		\$358,105	\$703,013

Tip: In Excel, hold **CTRL**, select multiple cells, and their sum will be automatically shown in the very bottom toolbar.

Mapping Personnel (cont.)

- Use the OR Budget **Personnel Reference** tab to:
 - Translate % effort into **Person-Months**.
 - Combine effort entered on two rows/two formats.

Personnel					Enter effort either in Person Months or % Time (both)		
Name/Role:	Appt. Type	Effort Type	Base Salary	Months or %:	Person Months		
					Per 1	Per 2	Per 3
1 Harris Lewin - PI (AY)	9/12	AY	133,333	Months	6.00	6.00	
2 Prasant Mohapatra - Co-PI	12/12	CAL	166,667	Months	5.00	5.00	
3 Cheng-Hong Chi - Proj Sci	12/12	CAL	89,000	Months	6.00	6.00	
Personnel by %					% Time or Effort		
1 Harris Lewin - PI (SMR)	9/12	SMR	133,333	%	2.0%	2.0%	
2 Anu Patel - Postdoc	12/12	CAL	68,000	%	25.0%	25.0%	
3 TBD - GSR	12/12	CAL	57,000	%	25.0%	25.0%	
4 TBD - GSR	12/12	CAL	57,000	%	25.0%	25.0%	

Personnel Reference tab:

Personnel (For Reference)			Person Months (For agency forms) <small>APPT TYPE and BASIS (9/12, 11/12, 12/12) must be correctly indicated on the request sheet to ensure person month accuracy</small>					Annual Effort		
Name/Role:	Personnel Type? (Choose Below)		Period 1	Period 2	Period 3	Period 4	Period 5	Type	Period 1	Period 2
1 Harris Lewin - PI (AY)	Senior/Key		6.00	6.00	-	-	-	AY	50.00%	50.00%
2 Prasant Mohapatra - Co-PI	Senior/Key		5.00	5.00	-	-	-	CAL	41.67%	41.67%
3 Cheng-Hong Chi - Proj Sci	Senior/Key		6.00	6.00	-	-	-	CAL	50.00%	50.00%
1 Harris Lewin - PI (SMR)	Senior/Key		0.18	0.18	-	-	-	SMR	1.50%	1.50%
2 Anu Patel - Postdoc	Postdoc		3.00	3.00	-	-	-	CAL	25.00%	25.00%
3 TBD - GSR	GSR		3.00	3.00	-	-	-	CAL	25.00%	25.00%
4 TBD - GSR	GSR		3.00	3.00	-	-	-	CAL	25.00%	25.00%

Personnel Direct Costs									
Section	Year 1			Year 2			Total Funds Requested		
	# Personnel	Months	Funds	# Personnel	Months	Funds			
A. Senior/Key Personnel [Manage]	4	17.18	\$205,501	4	17.18	\$211,665	\$417,166		
Harris A Lewin (PI)		6.18	\$ 91,556		6.18	\$ 94,302	\$185,858		
Prasant Mohapatra (co-PI)		5	\$ 69,445		5	\$ 71,528	\$140,973		
Cheng-Hong CHI (Other Sr Personnel)		6	\$ 44,500		6	\$ 45,835	\$90,335		
B. Other Personnel	3		\$45,500	3		\$46,866	\$92,366		
Postdoctoral Scholars	1	3	\$ 17,000	1	3	\$ 17,510	\$34,510		
Other Professionals	0	0.00	\$ 0	0	0.00	\$ 0	\$0		
Graduate Students	2		\$ 28,500	2		\$ 29,356	\$57,856		
Undergraduate Students	0		\$ 0	0		\$ 0	\$0		
Administrative/Clerical	0		\$ 0	0		\$ 0	\$0		
Other	0		\$ 0	0		\$ 0	\$0		
Total Salaries and Wages for Senior/Key and Other Personnel (A-B)	Year 1 (A-B)		\$251,001	Year 2 (A-B)		\$258,531	\$509,532		
C. Fringe Benefits			\$93,907			\$99,574	\$193,481		
			\$ 93,907			\$ 99,574			
Total Salaries, Wages & Fringe Benefits (A-C)	Year 1 (A-C)		\$344,908	Year 2 (A-C)		\$358,105	\$703,013		

Mapping other Direct Costs

Research.gov doesn't have a section for **GSR Tuition & Fees**, so include under **Other**.

EQUIPMENT									Total			
Super hi-tech piece of equipment			8,000						8,000			
Total Equipment			8,000	0	0	0	0	0	8,000			
TRAVEL		International?	Period 1	Period 2	Period 3	Period 4	Period 5		Total			
Poster presentation at conference (1 trip, PI and Co-PI)		No	5,000	5,000					10,000			
International Conference (1 trip, PI and Co-PI)		Yes	8,000	8,000					16,000			
Total Domestic Travel			5,000	5,000	0	0	0	0	10,000			
Total International Travel			8,000	8,000	0	0	0	0	16,000			
Total Travel			13,000	13,000	0	0	0	0	26,000			
OTHER DIRECT COSTS			Period 1	Period 2	Period 3	Period 4	Period 5		Total			
Materials and Supplies												
Study materials			500	500					1,000			
Total Materials and Supplies			500	500	0	0	0	0	1,000			
Consultant Services									Total			
Brett McFarland			20,000	20,000					40,000			
Total Consultant Services			20,000	20,000	0	0	0	0	40,000			
GSR Tuition/Fees			P2	P3	P4	P5	Academic Year Rate Split:					
Available Tuition M			9	0	0	0	3/6	3/6	0/0	0/0	0/0	Total
Name or Notes		Use Buydown	#GSRs	#GSRs	#GSRs	#GSRs	36,552	38,380	0	0	0	74,932
GSR - TBD		Resident	1				18,276	19,190	0	0	0	37,466
GSR - TBD		Resident	1				18,276	19,190	0	0	0	37,466
Total Other Direct Costs			57,552	59,380	0	0	0	0	0	0	0	116,932
Other Expenses		Subject to IDC Calc (MTDC)?										Total
Study Participant Incentive Costs		Yes	500	500								1,000
Other Expenses Subject to Indirect:			500	500	0	0	0	0	0	0	0	1,000
Other Expenses Excluded from Indirect:			0	0	0	0	0	0	0	0	0	0
Total Other Direct Costs			57,552	59,380	0	0	0	0	0	0	0	116,932
Total Direct Costs		Choose					423,460	430,485	0	0	0	853,945
Indirect Cost/F&A Rate:		0		61% MTDC			378,908	392,105	0	0	0	771,013
Indirect Costs:							231,134	239,184	0	0	0	470,318
Total Costs (Direct + Indirect):			\$654,594	\$669,669	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$1,324,263

Additional Direct Costs					
Section	Year 1		Total Funds Requested		
	# Participants	Funds			
	Year 2				
	# Participants	Funds			
D. Equipment		\$8,000	\$0	\$8,000	
1. Super hi-tech piece of eq		\$ 8,000	\$ 0	\$8,000	
+ Add Equipment					
E. Travel		\$13,000	\$13,000	\$26,000	
US, territories, and possessions		\$ 5,000	\$ 5,000	\$10,000	
Foreign		\$ 8,000	\$ 8,000	\$16,000	
F. Participant Support Costs		\$0	\$0	\$0	
G. Other Direct Costs		\$57,552	\$59,380	\$116,932	
Materials and Supplies		\$ 500	\$ 500	\$1,000	
Publication		\$ 0	\$ 0	\$0	
Costs/Documentation/Distrib		\$ 0	\$ 0	\$0	
Consultant Services		\$ 20,000	\$ 20,000	\$40,000	
Computer Services		\$ 0	\$ 0	\$0	
Other		\$ 37,052	\$ 38,880	\$75,932	
H. Total Direct Costs (A-G)	Year 1 (A-G)	\$423,460	Year 2 (A-G)	\$430,485	\$853,945

Activity 1: Translating Effort

Indicate the appropriate effort in **Person Months** to enter in the NSF spreadsheet for the following:

Personnel					Enter effort either in Person Months (top section) or % Time (bottom section)				
Name/Role:	Appt. Type	Effort Type	Base Salary	Months or %:	Person Months				
					Per 1	Per 2	Per 3	Per 4	Per 5
1 Mohandes Singh (PI) - SMR	11/12	SMR	181,224	Months	0.50	0.50	0.50	0.50	0.50
2 Youa Thao - SMR	9/12	SMR	168,000	Months	0.50	0.50	1.50	1.50	1.50
Personnel by %					% Time or Effort				
1 Mohandes Singh (PI) - AY	11/12	AY	181,224	%	20.0%	20.0%	20.0%	20.0%	20.0%
2 Youa Thao - AY	9/12	AY	168,000	%	15.0%	15.0%	25.0%	25.0%	25.0%

1. PI Singh in Period 1:

- A. 20.50
- B. 2.20
- C. 2.70**
- D. 1.85

Personnel Reference tab

Personnel	Person Months (For agency forms) <i>APPT TYPE and BASIS (9/12,11/12,12/12) must be correctly indicated on the request sheet to ensure person month accuracy</i>						Annual Effort based on 12 months					
	Name/Role:	Period 1	Period 2	Period 3	Period 4	Period 5	Type	Period 1	Period 2	Period 3	Period 4	Period 5
1 Mohandes Singh (PI) - SMR	0.50	0.50	0.50	0.50	0.50	0.50	SMR	4.17%	4.17%	4.17%	4.17%	4.17%
2 Youa Thao - SMR	0.50	0.50	1.50	1.50	1.50	1.50	SMR	4.17%	4.17%	12.50%	12.50%	12.50%
1 Mohandes Singh (PI) - AY	2.20	2.20	2.20	2.20	2.20	2.20	AY	18.33%	18.33%	18.33%	18.33%	18.33%
2 Youa Thao - AY	1.35	1.35	2.25	2.25	2.25	2.25	AY	11.25%	11.25%	18.75%	18.75%	18.75%

2. Youa Thao in Period 3:

- A. 1.85
- B. 1.5
- C. 3.70
- D. 3.75**

Mapping Personnel



NSPIRES requirements are like those in Research.gov:

- Enter effort in Person-Months (Use **Personnel Reference** tab).
- Tally **Other Personnel** categories.

Budget Period 1 - A. Senior/Key Person							
Name (Role)	Base Salary	Months			Requested Salary	Fringe Benefits	Funds Requested
		Cal.	Acad.	Sum.			
Desdegali, Mario (PI)	\$136,600.00		1		\$11,379.00 + \$1,195.00 =	\$12,574.00	
Total Senior/Key Person:							\$12,574.00

Budget Period 1 - B. Other Personnel							
# of Personnel	Project Role	Months			Requested Salary	Fringe Benefits	Funds Requested
		Cal.	Acad.	Sum.			
	Post Doctoral Associates				+	=	\$0.00
1	Graduate Students				\$54,050.00 + \$1,085.00 =	\$55,135.00	
1	Undergraduate Students				\$6,682.00 + \$134.00 =	\$6,816.00	
	Secretarial / Clerical				+	=	\$0.00
2 Total # Other Personnel							\$61,951.00

Mapping other Direct Costs



GSR Tuition & Fees are entered under **Other Direct Costs**.

C. Equipment Description	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
D. Travel	\$33,826.00	\$10,978.00	\$11,970.00	\$0.00	\$56,774.00
E. Participant/Trainee Support Costs	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
F. Other Direct Costs	\$180,227.00	\$203,669.00	\$155,940.00	\$0.00	\$539,836.00
G. Direct Costs (A through F)	\$288,578.00	\$304,492.00	\$253,891.00	\$0.00	\$846,961.00
H. Indirect Costs	\$120,994.00	\$81,641.00	\$70,242.00	\$0.00	\$272,877.00
I. Total Direct and Indirect Costs (G + H)	\$409,572.00	\$386,133.00	\$324,133.00	\$0.00	\$1,119,838.00
J. Fee	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
K. Budget Total (I + J)	\$409,572.00	\$386,133.00	\$324,133.00	\$0.00	\$1,119,838.00

Budget Period 1 - F. Other Direct Costs	
Item Description	Funds Requested
1. Materials and Supplies	\$15,000.00
2. Publication Costs	
3. Consultant Services	
4. ADP/Computer Services	
5. Subawards/Consortium/Contractual Costs	\$134,134.00
6. Equipment or Facility Rental/User Fees	
13. Tuition and Fees	\$31,093.00
Total Other Direct Costs:	\$180,227.00

Mapping Indirect Costs



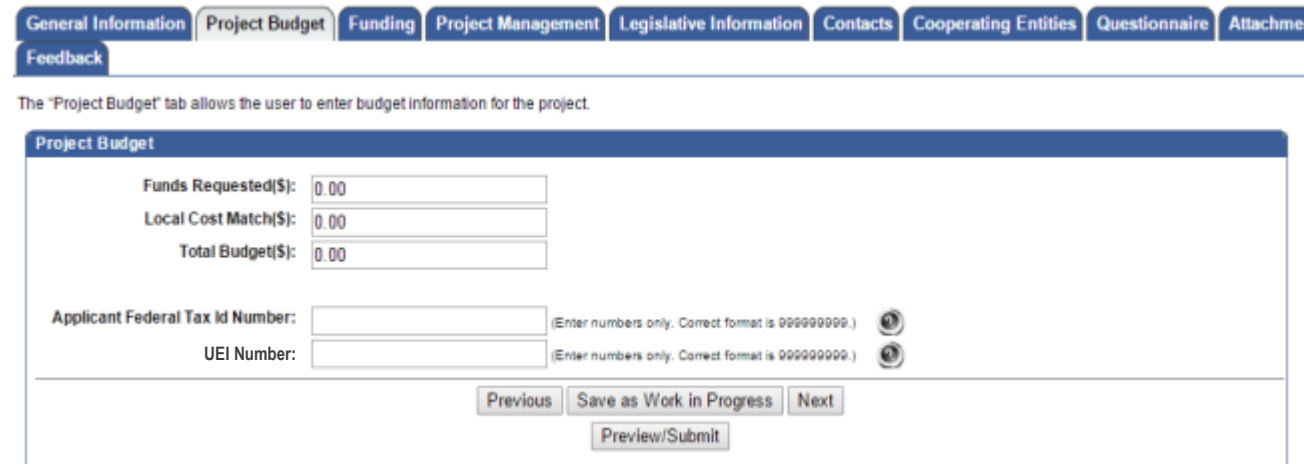
As with Research.gov, enter the **Rate** and **Base** to have the form calculate the indirect costs.

Indirect Cost Listing			
Item	Indirect Cost Rate	Indirect Cost Base	Funds Requested
1. Indirect Costs	61%	\$198,351.00	\$120,994.00
Total Indirect Costs:			\$120,994.00

Mapping a FAAST Budget

For FAAST research proposals, budgets are a 2-stage process:

1. In the **Project Budget** tab enter:
 - Funds Requested
 - Local Cost Match (i.e., Cost Sharing)
 - Total Project Budget
 - UC Davis’s Federal Tax ID Number & UEI Number
 - Both are found on UCD’s [Institutional Information](#) page



The "Project Budget" tab allows the user to enter budget information for the project.

Project Budget

Funds Requested(\$):

Local Cost Match(\$):

Total Budget(\$):

Applicant Federal Tax Id Number: (Enter numbers only. Correct format is 000000000.) ⓘ

UEI Number: (Enter numbers only. Correct format is 000000000.) ⓘ

FAAST Budget Templates

2. Separately attach a PDF of the budget using a template identified in the RFP, such as the one shown at right.
 - Enter budget category totals.
 - Note that in this example the definition of **Equipment** differs from the UC Davis threshold of \$5,000 for equipment.
 - **Equipment** that doesn't meet the sponsor's definition should be entered in their budget as **Supplies** (though internally at UCD will remain considered **Equipment**).

Specialty Crop Block Grant Program - Concept Proposal Budget

Form 1.6.1.2. (08.2025)

State of California

California Department of Food and Agriculture

Office of Grants Administration

Proposal Identification Number (PIN)	
Total SCBGP Funds Requested	\$0

For each budget category described in column one below, enter the amount of Specialty Crop Block Grant Program (SCBGP) funds requested (rounded to the nearest whole dollar) in column two and a description of the costs or activities to be covered in column three. A description is required for each budget category in which funds are requested, except for category H. Indirect Costs and category I. Total SCBGP Funds Requested. Failure to submit the required budget template or submission of an alternate template/file type may result in disqualification.

Budget Categories	Amount of Funds Requested (Round to nearest whole dollar)	Description of Costs or Activities (Required except for categories H. and I.)
A. Salary and Wages Cost of salary and wages for time spent working on the project by employees of the applicant organization.	\$0	Enter a description of costs or activities for the Salary and Wages budget category.
B. Fringe Benefits Cost of fringe benefits for time spent working on the project in accordance with the applicant organization's established fringe benefits policy.	\$0	Enter a description of costs or activities for the Fringe Benefits budget category.
C. Travel¹ Cost of project related travel for all individuals except contractual personnel.	\$0	Enter a description of costs or activities for the Travel budget category.
D. Special Purpose Equipment Cost to purchase special purpose equipment (for items greater than \$10,000 per unit) necessary to achieve project objectives.	\$0	Enter a description of the costs or activities for the Special Purpose Equipment budget category.

FAAST Budget Templates

- Though this was likely made clear in the sponsor's Request for Proposal (RFP) guidelines, the template in this example specifies that **Indirect Costs** have a cap of 8% of personnel costs only.

E. Supplies Cost to purchase supplies (for items less than \$10,000 per unit) necessary to achieve project objectives.	\$0	Enter a description of costs or activities for the Supplies budget category.
F. Contractual ² Cost of work by individuals/organizations other than the applicant (e.g., cooperators, consultants, contractors, partners, etc.).	\$0	Enter a description of costs or activities for the Contractual budget category.
G. Other Cost of all other expenses (e.g., conference registration, speaker/trainer fees, stipends, publication fees, data collection, lab analysis, rentals, subscriptions, etc.).	\$0	Enter a description of costs or activities for the Other budget category.
H. Indirect Costs Facilities and administrative costs.	\$0	Must not exceed 8.00% of total personnel costs (A. Salary and Wages + B. Fringe Benefits)
I. Total SCBGP Funds Requested Sum of categories A through H.	\$0	Must match "Funds Requested" in FAAST and be within the grant funding range as specified in the Request for Concept Proposals.
J. Program Income Income (if any) that may be generated by a supported activity or earned as a result of the award.	\$0	Enter a description of any Program Income that may be generated as a result of the award.

¹ Travel within and outside of California must not exceed the travel rates established by the U.S. General Services Administration (GSA) <http://www.gsa.gov/portal/content/104877>

² Contractual hourly rates must not exceed the GS-15 step 10 rate for your area. To access the GS-15 step 10 rate, visit the following website and click on GS Pay Tables under General Schedule and Locality Pay Tables: <https://www.opm.gov/policy-data-oversight/pay-leave/salaries-wages/>

Mapping a Budget

ProposalCentral allows sponsors to pick and choose the budget categories they wish to see in their proposal.

- Budget categories can therefore differ by sponsor.

Click on column header to edit detail.

	Period 1	Period 2	Total
<i>Enter Personnel Costs for each budget period below: (U.S Dollars)</i>			
Salaries & Wages	\$17,000.00	\$17,510.00	\$34,510.00
Fringe Benefits	\$4,261.00	\$4,523.00	\$8,784.00
SubTotal: Personnel Costs	\$21,261.00	\$22,033.00	\$43,294.00
<i>Enter Non-personnel Costs for each budget period below:(U.S. Dollars)</i>			
Equipment (Itemized)	\$8,000.00	\$0.00	\$8,000.00
Supplies	\$500.00	\$500.00	\$1,000.00
Travel	\$6,500.00	\$6,500.00	\$13,000.00
Miscellaneous	\$500.00	\$500.00	\$1,000.00
Sub Total: Non-Personnel Costs	\$15,500.00	\$7,500.00	\$23,000.00
<i>Enter Indirect Costs for each budget period below:(U.S. Dollars)</i>			
Indirect Costs	\$3,676.00	\$2,953.00	\$6,629.00
Sub Total: Indirect costs:	\$3,676.00	\$2,953.00	\$6,629.00
Total Costs:	\$40,437.00	\$32,486.00	\$72,923.00

Common Pitfalls

- **Salary cap issues** (i.e., NIH)
 - How do you enter salaries when the sponsor doesn't allow escalations?
 - See [How to Work with NIH Salary Caps](#)
- **Misclassified Participant/Trainee Support Costs** (i.e., NSF)
 - This category is limited to individuals who receive training funded by a sponsored award.
 - Entries in this category are excluded from the Modified Total Direct Cost (MTDC) base used to determine indirect costs.
 - See the **Participant Support Costs** section of the [Proposal Budget Handbook](#) for additional guidance.
- **Dollar drift from formulas**
 - When entering formulas in a sponsor form/template, such as for effort or escalations, totals will sometimes differ from the OR Budget Template.
 - Check totals and make revisions as you go so the final budget entered matches the internal budget as closely as possible.



Common Pitfalls

- **Subaward budgets misaligned**

- Check to ensure any budget form completed by a subrecipient (e.g., NIH R&R Subaward Budget Attachment Form, or NSF Subaward Budget in Research.gov) matches the subaward direct and indirect costs you/the PI indicate in the budget.
 - If the two don't match *exactly*, the sponsor system may flag the inconsistency.
- Always reconcile totals before uploading.
- Ask subrecipients to send their completed sponsor budget form *and* their internal detail so you can check that totals match exactly.



Example:

- UC Davis budget shows the subaward total = \$100,257
- You upload into Cayuse the subrecipient's R&R Subaward form with a total = \$100,260 (maybe because their fringe calculation carried more decimal places).
- The sponsor system auto-compares your **Consortium Total** in the prime budget with the total in the subaward form.
 - \$3 difference = error message = submission blocked.

Populating Sponsor Spreadsheets



Activity 2: MJFF Excel Budget

Use the **MJFF Activity 1 Budget Scenario.xlsx** to populate the **Team** (i.e. **Personnel**) section of the sponsor template titled **MJFF Budget_Template.xlsx**.

- This is an actual required **Michael J. Fox Foundation (MJFF)** budget template.
- UC Davis is **Subawardee Institution 2** so only complete that section (rows 96 – 141)

-1

-1

	A	B
1		
2		
3		
4		
5		
6		
7	START HERE	
8		
9	Please start by entering the name of the primary institution and up to four subawardee institutions below. The names entered here will flow into the Detailed Budget tab. Each institution listed below must complete a detailed budget for its own institution on the next tab.	
10		
11	Team	
12	Name of Primary Institution:	California Institute of Technology - Gradinaru
13	Name of Subawardee Institution 1	California Institute of Technology - Mazmanian
14	Name of Subawardee Institution 2	University California, Davis
15	Name of Subawardee Institution 3	Max Planck Florida Institute
16	Name of Subawardee Institution 4	University California, San Diego
17	Name of Subawardee Institution 5*	University of Kentucky
18	Name of Subawardee Institution 6*	Stanford
19	*Subawardee Institution 5 and 6 should only be utilized if the exception described in the ASAP Team, Application, and Budget Guidelines applies.	
20	Please note that the Summary tab will autopopulate based on the values ente	

Activity 2: MJFF Excel Budget



THE MICHAEL J. FOX FOUNDATION
FOR PARKINSON'S RESEARCH

Use the **MJFF Activity 1 Budget Scenario.xlsx** to populate the **Team (i.e. Personnel)** section of the sponsor template titled **MJFF Budget_Template.xlsx**.

- General challenges
 - The spreadsheet is locked. You cannot:
 - Hide unnecessary rows/columns
 - Reduce or expand rows/columns
- **Team** challenges:
 - The template does not allow different fringe benefit rates across fiscal years.
 - For each individual, a helpful formula to determine the **% Benefits** cell is:

$$\frac{\text{Total Personnel Costs}}{(\text{Averaged annual effort} * \text{Sum of all Base Salaries})} - 1$$

round to 6 decimals

Example: $\frac{\$89,853 \text{ (total salary \& benefits for PI Roberts)}}{0.25 * (139,000 + 143,170)} - 1$

=0.273743, or 27.3743%

Tips:

- **Year 2 Base Salary per FTE** can be found on the **Personnel Reference** tab.
 - See **Base Salary with Escalations**
- To sum **Total Personnel Costs** for an individual:
 - Press **CTRL + Click** then drag to highlight an individual's salary and then benefits for all Project Periods.
 - Check **Sum:** in the far bottom toolbar for the total of all selected cells.

Note: You could enter this formula in cell R99: =ROUND(89853/(F99*(E99+I99))-1,6)

Then copy + paste (or drag bottom right corner of populated cell) into rows below. Be sure to then adjust the **Total Personnel Costs** for each individual.

MJFF Excel Budget



Other Direct Costs challenges:

- **Cost per item** requires some items to be listed twice.
 - For instance, **GSR Tuition** increases in Year 2, so entering one line with the total of both years (\$18,080 + \$18,984) would make it seem like both years charge the same amount (or \$18,532/year), which is incorrect.
 - It is therefore more appropriate to enter **GSR Tuition** on two lines, one for Year 1 (with a 1 in the **Year 1 Quantity** column) and another for Year 2 (with a 1 in the **Year 2 Quantity** column).

Item Description	Expense Category	Purpose of Item	Cost per Item	Year 1 Quantity
Field Test Camera	Equipment	NHP Research	\$ 10,000.00	1
Computing Storage	Other	NHP Research	\$ 5,000.00	1
Materials Implants	Other	NHP Research	\$ 5,000.00	1
GSR Tuition (Year 1)	Other	NHP Research	\$ 18,080.00	1
GSR Tuition (Year 2)	Other	NHP Research	\$ 18,984.00	1
Animal Costs - Acquisitions	Other	NHP Research	\$ 135,000.00	1
Animal Costs - Per Diems (Year 1)	Other	NHP Research	\$ 55,581.00	1
Animal Costs - Per Diems (Year 2)	Other	NHP Research	\$ 57,159.00	
CNPRC Labor (SRA, Maintenance, Tech)	Other	NHP Research	\$ 59,848.00	1
Imaging Costs (PET, MRI, CT)	Other	NHP Research	\$ 214,991.00	1
Field Testing (incl. camera installation)	Other	NHP Research	\$ 47,150.00	1
Field Testing	Other	NHP Research	\$ 43,114.00	
	Equipment			
	Supplies			
	Travel			
	Training			
	Other			

Campus Resource

Foundation and Corporate Engagement (FCE): This unit is expert at working with **corporations** and **foundations**.

- FCE works directly with these types of funders/sponsors to pitch UCD projects.
- FCE provides advice and review of both internal (OR Budget Template) and external budgets to sponsors.
 - They sometimes help write and review the narrative content.
- FCE does its best to walk faculty through portal submissions once they have the internal OR budget template done.
- **NOTE:** Indirect cost rates for corporations are different from foundations under the same parent organization.
 - For example, AARP Foundation vs. AARP Association, which is a not-for-profit corporation.
 - FCE likes to say, “If you know one company, you know one company. Same with foundations.”

DARPA Excel Budget



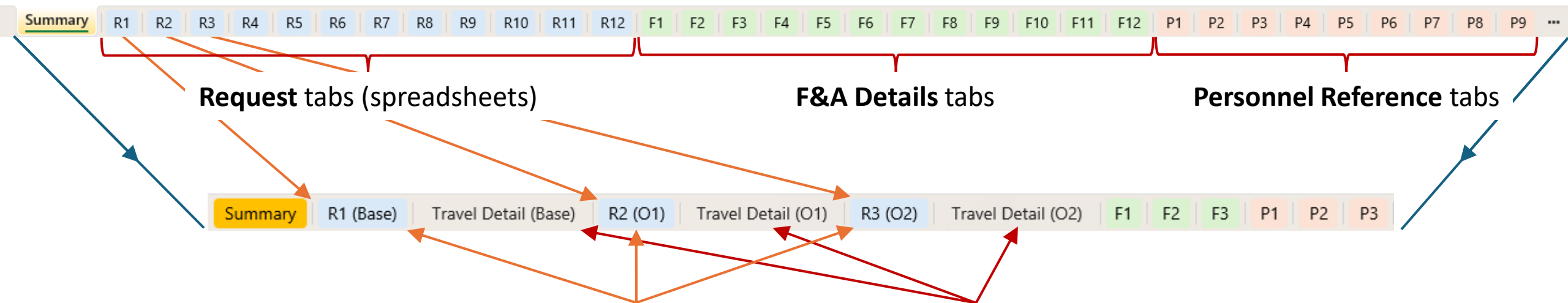
The DARPA (Defense Advanced Research Projects Agency) budget spreadsheet used in our next activity is for a **cost proposal** that has multiple **Technical Areas**.

- **Cost Proposal:** Some funding opportunity announcements request **two proposals**:
 - A **technical proposal** on project details, and
 - A **cost proposal** on finances
 - See SPO's [Preparing a Cost Proposal](#) workshop slide deck (from 2023) for more details.
- **Technical Area (TA):** A workstream or focus area within a program.
 - Each TA has its own objectives, deliverables and evaluation criteria.
 - For the purposes of this class, we'll use a simplified budget that is limited to a single TA.

DARPA: OR Budget Template

You will use **DARPA Template C Budget Scenario** to populate the template titled **DARPA**.

- This is a **Multi-Budget** template (Template C)
 - Many of the tabs at bottom have been **hidden** (NOT deleted!) to simplify the view.



- Descriptors were added to the **Request** tabs to clarify what they represent.

- Three tabs were added to provide additional details.

DARPA: OR Budget Template

The DARPA budget spreadsheet requires entry by each Proposer's (i.e., UCD's) accounting period (i.e., fiscal year).

- For this reason, each project period is broken into fiscal years.
- The OR Budget Templates allow you to adjust the first budget period as needed.

- i.e., 1 month in this case (until the end of a fiscal year).
- To customize subsequent budget periods from the 12-month default, email request to aabunn@ucdavis.edu.

18-month Base (aka Phase 1) project period divided by UCD fiscal years (which start 7/1)

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	
1			Proposed:	Awarded:															
2	Start Date:	6/1/2026			Non-NIH	Title:	SCI: Protecting America with Popsicles and Rubber Bands (Base / Phase 1)												
3	End Date:	11/30/2027				PI(s):	Carol Burnett												
4	Change estimates based on awarded dates?				Yes	Notes:	18 month project period split by UCD Fiscal Years (to facilitate DARPA budget population)												
5	Personnel						Enter effort either in Person Months (top section) or % Time (bottom section)												
6																			
7	Name/Role:				Appt. Type	Effort Type	Base Salary	Months or %:	Person Months					*	1 Month	12 Months	5 Months		
8									Per 1	Per 2	Per 3	Per 4	Per 5	Escal	Period 1	Period 2	Period 3		
24	Personnel by %						% Time or Effort												
25	1	Carol Burnett - PI				9/12	AY	212,592	%	50.0%	50.0%	50.0%				8,858	106,296	44,290	
26	2	Mel Brooks - Co-PI				12/12	CAL	187,600	%	20.0%	20.0%	20.0%				3,127	37,520	15,633	
27	3	WC Fields - Investigator				9/12	AY	121,400	%	10.0%	10.0%	10.0%				1,012	12,140	5,058	
28	4	Lucille Ball - Lab Asst				12/12	CAL	66,000	%	50.0%	50.0%	50.0%				2,750	33,000	13,750	
29	5	Jack Benny - Postdoc				12/12	CAL	71,632	%	15.0%	15.0%	15.0%				895	10,745	4,477	
30	6	Bob Hope - GSR				12/12	CAL	71,895	%	5.0%	5.0%	5.0%				300	3,595	1,498	
54	Total Salaries																		
55																			
56							FY Split:	1/0	12/0	5/0	0/0	0/0							
57	Benefits by Person						UCPath CBR Group					%	%	%	%	%	Period 1	Period 2	Period 3
74	1	Carol Burnett - PI				Faculty, Acad, MSP, Safety	40.4	41.6	42.8							3,579	44,219	18,956	
75	2	Mel Brooks - Co-PI				HCOMP Faculty & SMG	26.5	27.3	28.1							829	10,243	4,393	
76	3	WC Fields - Investigator				Faculty, Acad, MSP, Safety	40.4	41.6	42.8							409	5,050	2,165	
77	4	Lucille Ball - Lab Asst				All Other Staff	51.6	53.1	54.7							1,419	17,523	7,521	
78	5	Jack Benny - Postdoc				Postdoc Employees	24.6	25.3	26.1							220	2,718	1,168	
79	6	Bob Hope - GSR				Grad and Undergrad	1.7	1.8	1.9							5	65	28	
103	Total Benefits																		
104	Total Personnel																		

DARPA: OR Budget Template

Tip: It can save time and effort if you review the budget format required by the sponsor before populating an OR Budget Template.

- While all budget items could have been entered in a single OR Budget Template, by reviewing DARPA's requirements ahead of time, we noticed:
 - The sponsor requires entries be broken down by UCD **fiscal year**
 - The sponsor also requires entries be broken down by project **Phase**
- This informed us that a separate OR Budget Template for each **Phase**, with project periods broken down by **fiscal year** would simplify translation from the internal budget into the sponsor's required format.

Many figures are derived by multiplying the project period amount by the number of months in that fiscal year / 12 months.

Option 1 / Phase 2

7 Months	5 Months	0 Months	0 Months	0 Months	12 Months	
					Escalation:	Multi
Period 3	Period 4	Period 5	Period 6	Period 7	Total	
12/1/27-6/30/28	7/1/28-11/30/28	-	-	-	12/1/27-11/30/28	
Period 3	Period 4	Period 5	Period 6	Period 7	Total	
5,215	3,725				8,940	
5,215	3,725	0	0	0	8,940	

$$=8,940 * 7/12$$

$$=8,940 * 5/12$$

DARPA Excel Budget

We now turn to the DARPA spreadsheet. Key terms:

- **Phase:** Project Period
 - Phase 1 is usually the proof-of-concept or early feasibility stage.
 - Later phases build on earlier work for larger scale prototypes, field tests, or integration.
 - At the end of each phase, DARPA typically conducts a review to determine whether to proceed to the next Phase/Option.
- **Base:** 1st Project Period, i.e. “Phase 1” (can be an odd period, like 18 months)
 - This is the initial, guaranteed portion of an award.
- **Options:** Subsequent Anticipated Project Periods (can be an odd period, like 15 months each)
- **Task:** Unit of work inside a Technical Area (TA)/Phase
 - Specific activity or activities to be performed to meet the objectives.
 - Tasks often have their own deliverables, due dates, and sometimes distinct cost accounts

DARPA Excel Budget

There are numerous tabs.

- As our scenario is for only 1 TA, you can safely ignore X'd out tabs.

The image shows a horizontal scroll bar of Excel tabs. The tabs are: General, Instructions, Proposer Constants, Labor Rates, Indirect Rates and Profit_Fee, Total Amount, TA Summary, Base (Phase 1), Phase 1 TA 1, Phase 1 TA 2, Phase 1 TA 3, O-I (Phase 2), Phase 2 TA 1, Phase 2 TA 2, Phase 2 TA 3, O-II (Phase 3), Phase 3 TA 1, Phase 3 TA 2, Phase 3 TA 3, Subcontractor, Consultants, Materials-Supplies, Equipment, Travel, ODC Details, Animal-Human Use Y-N, Animal Related, Human Subjects Research, Expenditures by Month, Milestones and Deliverables, Task 1, Task 2. Red 'X' marks are placed over Phase 1 TA 2, Phase 1 TA 3, Phase 2 TA 2, Phase 2 TA 3, Phase 3 TA 2, and Phase 3 TA 3. Brackets group the tabs into three project periods: 1st Project Period (Base) covering Base (Phase 1) through Phase 1 TA 3; 2nd Project Period (Option 1) covering O-I (Phase 2) through Phase 2 TA 3; and 3rd Project Period (Option 2) covering O-II (Phase 3) through Phase 3 TA 3. A red arrow points to the right at the end of the top row of tabs. Below the top row, a red arrow points to the left at the beginning of the bottom row of tabs. A red arrow points down from the ODC Details tab to the text 'Other Direct Costs'. Below the bottom row of tabs, there are two instructions: 'Use the arrows on the far left to scroll along the tab bar.' and 'Use the scroll bar on the far right to move within a tab.'

1st Project Period (Base)

2nd Project Period (Option 1)

3rd Project Period (Option 2)

Other Direct Costs

Use the **arrows** on the **far left** to scroll along the tab bar.

Use the **scroll bar** on the **far right** to move within a tab.

Task tabs should be used when proposal instructions request a breakdown of costs below the Option, Phase, or TA level.

- **Task** tabs can be duplicated as many times as needed and can be renamed to be appropriate for your proposal.

DARPA Excel Budget

Template instructions:

- Before entering project specifics, you first fill in the **yellow** fields on the following tabs:
 - **General**
 - **Proposer Constants**
 - A **Business Type** on this tab must be selected before **Labor Groups** and **Labor Categories** can be selected on the **Labor Rates** tab.
 - **Labor Rates**
 - **Indirect Rates**
- **Yellow** and Clear cells are for data entry throughout the entire DARPA document.
- **Gray** cells indicate references or formulas that should not be changed unless the formula does not match your organization's business rules.
 - If you change these formulas, you must ensure the change does not affect the overall flow of the spreadsheet.

DARPA General tab

General tab:

The following have already been updated for you:

1. **Proposer Name:**
UC Davis
2. **Proposer's CAGE:**
1CBG4

- UCD's CAGE (Commercial and Government Entity) code is found on its [Institutional Information](#) webpage.

DARPA Standard Cost Proposal Spreadsheet (Multiple Technical Areas)

Proposer Name:	Proposer's Name	Proposer's CAGE
Top Prime Proposer:	Prime Contractor (Fill-in) (if applicable)	Prime's CAGE
Solicitation No.	Solicitation # (Fill-in)	
Proposer's Proposal ID:	Proposer's Proposal ID	
SBIR/STTR Phase:	Not Applicable	(drop-down list)

GENERAL INFORMATION

The purpose of the requested information in the 30 attached worksheets is to assist government personnel in the review and evaluation of cost proposals submitted by proposers. Proposers are reminded that the responsibility for providing adequate supporting data and attachments lies solely with them. Further, the proposer must also bear the burden of proof in establishing reasonableness of proposed costs; therefore, it is in the proposer's best interest to submit a fully supportable and well-prepared cost proposal. The basis and rationale for all proposed costs should be provided as part of the proposal so that Government personnel can place reliance on the information as current, complete and accurate. Further, for procurement contracts, FAR 15.403-4 sets forth those circumstances in which proposers are required to submit certified cost or pricing data. This spreadsheet should be used for all cost proposals, regardless of award instrument: grant, cooperative agreement, contract, other transaction, or technology investment agreement.

The purpose of this cost proposal spreadsheet is to assist the Government in completing a rapid analysis of your proposed costs and, if your proposal is selected for award, speeding up the negotiation and award execution process.

Cost by Technical Area: In addition to providing summary by period of performance (Base and any Options), the contractor is also responsible for providing a breakdown of cost for each Technical Area identified in the statement of work. The sum of all cost by Technical Area worksheets MUST equal the total cost summary.

Options: Unpriced Options will not be accepted. Any Option that is not fully priced, will not be included in any resulting award.

Enter the proposed cost detail for the Base and each Option period (as needed) on the tabs titled "Phase 1 TA 1", "Phase 1 TA 2", "Phase 1 TA 3", "Phase 2 TA 1", etc. The tabs titled, "Total Amount" and "TA Summary" will automatically calculate from the Phase/TA tabs.

- Before entering other data, fill in yellow fields on General tab, Proposer Constants tab, Labor Rates tab, and Indirect Rates tab. A Business Type on the Proposer Constants tab must be selected before Labor Groups and Labor Categories can be selected on the Labor Rates tab.
- Proposers may add additional specific cost categories (Subcontractors, ODC types, etc.) as needed but must ensure those new cost categories track to the Total Amount tab. See the General Instructions document below for details.
- Yellow and Clear cells are for data entry. Gray cells indicate references or formulas that should not be changed unless the formula does not match your organization's business rules. If you change these formulas, you must ensure the change does not affect the overall flow of the spreadsheet.
- Ensure all costs from other worksheets are correct.
- If a row, column, or worksheet in this spreadsheet is not needed for your proposal, either ignore it or Hide it; do not delete it.

DARPA is interested in your updated cost proposal suggestions for improving. send an email to costpropo

Activity 3: DARPA Proposer Constants tab

Proposer Constants tab

1. Select the appropriate **Business Type** in cell **A4**.

Proposer Accounting Periods describe the begin/end dates for **UC Davis's** accounting periods that occur during the entire project.

- This has been done for you in the document.

Proposer Accounting Periods														
Enter the expected date range of each accounting period from the Proposer's perspective. A period change would represent a change in hourly rates or indirect cost rates.														
Proposer's Preferred Label:	UC Davis FY 1	UC Davis FY 2	UC Davis FY 3	UC Davis FY 4	UC Davis FY 5									
Fiscal Year Begin Date:	07/01/25	07/01/26	07/01/27	07/01/28	07/01/29									
Fiscal Year End Date:	06/30/26	06/30/27	06/30/28	06/30/29	06/30/30									
Note 1 - Proposers should set the period of performance for each Phase and each Technical Area for those Phases in cell C1 of the corresponding tabs.														

DARPA Labor Rates tab

Labor Rates tab

- **Salary** (i.e., labor) is entered not as annual salary but as an hourly rate (*see next slide*).
- The fringe benefit rates should be static (not split rates) as they are for a single UC Davis Fiscal Year.

Labor Rates								
University of California, Davis				UC Davis FY 1				
Pick-List Required 1. DARPA Labor Group	Pick-List Required 2. DARPA Labor Category	Open Text Proposer's Labor Category	Open Text Name or Comment	\$\$\$ Hourly Labor Rate	% Fringe Benefits Rate	% Labor Overhead Rate	% F&A Rate	Calculated Loaded Hourly Rate
Project Management	Principal Investigator	PI	Carol Burnett	\$ 101.82	40.40%	0.00%	61.00%	\$ 230.15
Project Management	Co-Principal Investigator	Co-PI	Mel Brooks	\$ 89.85	26.50%	0.00%	61.00%	\$ 182.99
Research	Faculty/Professor	Investigator	WC Fields	\$ 58.14	40.40%	0.00%	61.00%	\$ 131.43
Research	Research Assistant	Laboratory Assistant	Lucille Ball	\$ 31.61	51.60%	0.00%	61.00%	\$ 77.15
Research	Post-Doc	Post-Doc	Jack Benny	\$ 34.31	24.60%	0.00%	61.00%	\$ 68.82
Research	Graduate Research Assistant	GSR	Bob Hope	\$ 34.43	1.70%	0.00%	61.00%	\$ 56.38

Insert additional Labor Category rows above this line. Also select Base and all Option tabs before inserting new rows. Copy formulas from adjacent rows.

Project Management	<input type="text" value="Project Management"/> <ul style="list-style-type: none"> Principal Investigator Co-Principal Investigator Co-Investigator Project Manager
--------------------	---

Selecting **Project Management** allows you to then select **PI** or **Co-PI**.

How to Calculate Equivalent Hourly Rates

For sponsors that request salary in hourly rates, UC uses **2,088** to represent the **estimated number of work hours in a typical year** (i.e., 40 hour/wk).

Example: a PI with a base salary of \$133,333 will commit 10% effort to a project.

1. $\$133,333 / 2,088 = \mathbf{\$63.86}$ effective hourly rate

Note: the DARPA spreadsheet does these steps for you.

2. Add in the **fringe benefits:**

$\$63.86 \times \text{fringe rate} = \$63.86 \times \text{i.e., } 1.269 \text{ (1 + rate of 26.9%*)} = \mathbf{\$81.03 \text{ hourly rate + benefits}}$

3. Determine **annual effort:**

$\text{Effort} = 2,088 * 0.1 \text{ (10\%)} = \mathbf{208.8 \text{ hours}}$

4. Multiply **hourly rate + benefits** by **annual effort:**

$\$81.03 \times 208.8 \text{ hours} = \mathbf{\$16,919.96 \text{ total salary for budget period 1}}$

* If fringe benefits are a split rate

	<i>FY Split:</i>	<i>1/11</i>
UCPath CBR Group		%
Faculty, Acad, MSP, Safety		40.4/41.6

Determine the averaged rate using this formula:

(1st rate x 1st # of months/12 – shown at top) + (2nd rate x 2nd # of months/12)

Example:

40.4% = 0.404 and 41.6% = 0.416
 $((0.404 \times 1/12) + (0.416 \times 11/12)) =$
 $((0.404 \times 0.083) + (0.416 \times 0.917)) =$
 $(0.033532 + 0.381472) =$
 0.415004, or 41.5%

5. Add a statement to the sponsor in the **budget justification** along these lines:

- Indicated hourly rates are for proposal purposes only. Per UC policy, we will account based on annual base salary x effort.

Activity 3: DARPA Labor Rates tab

Labor Rates tab

1. Select the appropriate **Labor Group** (column 1) and **Labor Category** (column 2) for involved personnel.
2. **Hourly Labor Rate:** Using **Base Salary** from the OR Budget Template, add a formula for each individual that determines their hourly rate.
 - The first is provided for you.
3. **Fringe Benefits Rate:** Confirm the UCD fiscal year under **Proposer Constants**, then enter the appropriate **UC Path CBR Group %** rate for each individual.
4. **Labor Overhead Rate:** Ignore. Doesn't apply to UC Davis.
5. **F&A Rate:** Enter the appropriate F&A rate in each row from bottom of OR Budget Template.
 - Ignore the **Primate Rate** for now.

Labor Rates				UC Davis FY 1				
University of California, Davis				Now repeat this process for the next FY period (FY 2). When done, type Done in chat.				
Pick-List Required 1.	Pick-List Required 2.	Open Text	Open Text	\$\$\$	%	%	%	Calculated
DARPA Labor Group	DARPA Labor Category	Proposer's Labor Category	Name or Comment	Hourly Labor Rate	Fringe Benefits Rate	Labor Overhead Rate	F&A Rate	Loaded Hourly Rate
Project Management	Principal Investigator	PI	Carol Burnett	=212592/2088	0.00%	0.00%	0.00%	\$ 230.15
Project Management	Co-Principal Investigator	Co-PI	Mel Brooks		0.00%	0.00%	0.00%	\$ 182.99
Research	Faculty/Professor	Investigator	WC Fields		0.00%	0.00%	0.00%	\$ 131.43
Research	Research Assistant	Laboratory Assistant	Lucille Ball		0.00%	0.00%	0.00%	\$ 77.15
Research	Post-Doc	Post-Doc	Jack Benny		0.00%	0.00%	0.00%	\$ 68.82
Research	Graduate Research Assistant	GSR	Bob Hope		0.00%	0.00%	0.00%	\$ 56.38

Tip: When copying, It's best to right click and **paste values** or **formulas** only.

Insert additional Labor Category rows above this line. Also select Base and all Option tabs before inserting new rows. Copy formulas from adjacent rows.

DARPA Indirect Rates and Profit_Fee tab

Indirect Rates and Profit/Fee tab

- This tab is used to provide information to the sponsor about general UCD rates.
 - Cells in the **DARPA Rate Category** column provide drop-down options to add additional categories.
 - Pertinent general rates may come into play based on the specifics of your project.
 - **For today's class activity there is no need to add info.** Entries in this section do not affect calculations.
 - Note the instruction to provide a copy of UCD's [Negotiated Indirect Cost Rate Agreement \(NICRA\)](#) rates.
- From a review of the DARPA document, it's clear they organize **F&A (Facilities and Administrative)** rates under General and Administrative (G&A), so it makes sense to add our F&A rate(s) there.

Indirect Rates										
University of California, Davis										
		UC Davis FY 1	UC Davis FY 2	UC Davis FY 3	UC Davis FY 4	UC Davis FY 5	0	Basis of Rate	Applied Against	
DARPA Rate Category	Proposer's Indirect Rate Name	% Rate	% Rate	% Rate	% Rate	% Rate	% Rate	(Example: FPRA, FPRP, Estimate, etc.)		
Fringe	Labor Fringe									
Overhead (Labor)	Labor Overhead									
General and Administrative	G&A									
Insert additional Indirect Rates above this line										
Instructions: • If the rates have been approved/negotiated by a Government agency, provide a copy of the memorandum/agreement.										

Activity 3: Base (Phase 1) tab

Base (Phase 1) tab

- Entries in this tab are informational only, specifically row titles.

Populate the following yellow cells:

1. **Top of sheet:** The Base Period of Performance in the format indicated.

Cost Proposal - Base Effort	Enter proposed PoP as "MM/YY to MM/YY"
-----------------------------	--

2. **Subcontracts/Interorganizational Transfer:** The subaward institutions.

Subcontracts/Interorganizational Transfer		File/Tab Name or Link	
	Subcontract/Interorganizational Name - #01	Provide details in Subcontractor Tab	ab
	Subcontract/Interorganizational Name - #02	Provide details in Subcontractor Tab	ab
	Subcontract/Interorganizational Name - #03	Provide details in Subcontractor Tab	ab
	Insert line(s) for any additional Subcontractors/Interorganizational	Provide details in Subcontractor Tab	ab
	Total Subcontract Costs		

Activity 3: Phase 1 TA 1 tab

We now move to the **Phase 1 TA 1** tab

- Again, copy figures from OR Budget Template into pertinent **yellow** cells.

Enter the following:

1. **Top of sheet:** The Base Period of Performance in the format indicated.

Cost Proposal by Phase and Technical Area - Phase 1, TA 1 | Enter proposed PoP as "MM/YY to MM/YY"

2. **Hours:** Enter a formula to indicate each individual's effort in hours.

- This is usually an annual commitment in hours (2,088) multiplied by their effort.
 - Note: Payment of salaries for 9/12 or 11/12 appointments are typically spread over a 12-month period.
- 50% effort would be indicated as 0.5, and 10% effort as 0.1.
- As they are committing only 1 month during the first fiscal year, adjust the formula to reflect 1 month.

<u>Proposer's Labor Category (Note 1)</u>	<u>Name (Last, First)</u>	<u>Hours</u>
PI	Carol Burnett	$=(2088/12)*0.5$
Co-PI	Mel Brooks	
Investigator	WC Fields	
Laboratory Assistant	Lucille Ball	
Post-Doc	Jack Benny	
GSR	Bob Hope	
Total Direct Labor Hours/Costs		261

Activity 3: Phase 1 TA 1 tab

Phase 1 TA 1 tab

3. Subcontracts & Other Direct Costs: Populate yellow cells with figures from R1 (Base) template.

- Note: The **Consultants** rows are hidden in this screenshot.

Subcontracts/Interorganizational Transfer		File/Tab Name or Link							
	UC San Diego	<i>Provide details in Subcontractor Tab</i>							\$ -
	UC San Francisco	<i>Provide details in Subcontractor Tab</i>							
	Subcontract/Interorganizational Name - #03	<i>Provide details in Subcontractor Tab</i>							
	Insert line(s) for any additional Subcontractors/Interorganizational	<i>Provide details in Subcontractor Tab</i>							
	Total Subcontract Costs								\$ -
Other Direct Costs									
	Materials/Supplies	<i>Provide details in Materials Tab</i>							\$ 1,612
	Equipment	<i>Provide details in Equip. Tab</i>							\$ 50,859
	Travel	<i>Provide details in Travel Tab</i>							\$ -
	Animal Related (non-Labor)	<i>Provide details in Animal Related Tab</i>							\$ 15,433
	Human Subjects Research (non-Labor)	<i>Provide details in HSR Tab</i>							
	Insert line(s) for any other types of ODCs	<i>Provide details in ODC Tab</i>							\$ 1,965
	Total Other Direct Costs								\$ 69,869

Note: CNPRC’s bundled rates include labor but still belong in the **Animal Related (non-Labor)** row.

- DARPA (and other DoD sponsors) are strict about not letting a project tuck institutional salaries such as a grad student’s or lab tech’s pay under animal or human subjects research costs. “Non-labor” serves as a reminder.

Activity 3: Base (Phase 1) tab

Note that the **General & Administrative (G&A)** section shows an indirect base that reflects neither UCD's **Modified Total Direct Costs (MTDC) Rate** nor the **Primate Rate**.

General and Administrative (G&A) (See Indirect Rates Worksheet)		Base	Rate
G&A		\$ 93,270.57	0.000%
Insert lines(s) & titles(s) for any other G&A rates			
Total G&A Costs			

To correct this, return to the **Base (Phase 1)** tab and populate the following **yellow** cells:

1. General and Administrative (G&A):

General and Administrative (G&A) (See Indirect Rates Worksheet)		Base	Rate
G&A		\$ 93,270.57	0.000%
F&A minus equipment, GSR tuition/fees & subcontracts		\$ -	0.000%
Primate Center (CNPRC)		\$ -	0.000%
Total G&A Costs			

- a. Add a row for **MTDC**.
 - A helpful descriptor instead of “**MTDC**” is “**F&A minus equipment, GSR tuition/fees & subcontracts**”
 - This will likely cause the text to wrap in the cell.
- b. Add row for “**Primate Center (CNPRC)**”. Copy entire row 66, then right click and select **Insert Copied Cells**.
- c. **IMPORTANT:** When you enter a row on one DARPA spreadsheet, you have to enter it on ALL! Therefore, **repeat step b.** for the **Phase 1 TA 1** spreadsheet.
In a real proposal, you would add this row to all pertinent **Phase** tabs.

Activity 3: Phase 1 TA 1 tab

Return to the **Phase 1 TA 1** tab.

General and Administrative (G&A): Now populate this section with **Project Period 1** figures from the **F1 (F&A Details) tab** of the OR Budget Template.

General and Administrative (G&A) (See Indirect Rates Worksheet)		Base	Rate
	G&A	\$ 93,270.57	0.000%
	F&A minus equipment, GSR tuition/fees & subcontracts	\$ 25,015.00	61.000%
	Primate Center (CNPRC)	\$ 15,433.00	57.800%
	Total G&A Costs		

Activity 3: Phase 1 TA 1 tab

Continue by populating the **UC Davis FY 2** and **UC Davis FY 3** sections of the **Phase 1 TA 1** tab.

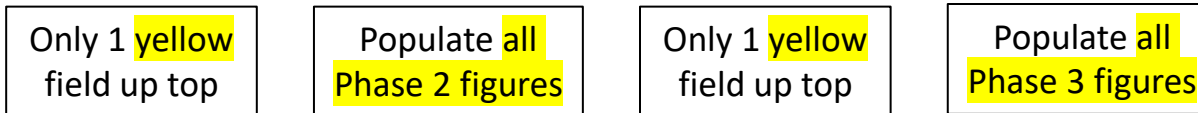
- When finished, type **Done** in the chat. This will conclude Activity 3.

UC Davis FY 2										UC Davis FY 3						
07/01/26 to 06/30/27										07/01/27 to 06/30/28						
Proposer's Labor Category (Note 1)	Hours	Hourly Labor Rate	Direct Labor Cost	Fringe Benefit Rate	Fringe Benefit Cost	Labor Overhead Rate	Labor Overhead Cost	Total \$	Hours	Hourly Labor Rate	Direct Labor Cost	Fringe Benefit Rate	Fringe Benefit Cost	Labor Overhead Rate	Labor Overhead Cost	Total \$
PI	1,044	\$101.82	\$ 106,296.00	41.60%	\$ 44,219.14	0.00%	\$ -	\$ 150,515	435	\$101.82	\$ 44,290.00	42.80%	\$ 18,956.12	0.00%	\$ -	\$ 63,246
Co-PI	418	\$89.85	\$ 37,520.00	27.30%	\$ 10,242.96	0.00%	\$ -	\$ 47,763	174	\$89.85	\$ 15,633.33	28.10%	\$ 4,392.97	0.00%	\$ -	\$ 20,026
Investigator	209	\$58.14	\$ 12,140.00	41.60%	\$ 5,050.24	0.00%	\$ -	\$ 17,190	87	\$58.14	\$ 5,058.33	42.80%	\$ 2,164.97	0.00%	\$ -	\$ 7,223
Laboratory Assistant	1,044	\$31.61	\$ 33,000.00	53.10%	\$ 17,523.00	0.00%	\$ -	\$ 50,523	435	\$31.61	\$ 13,750.00	54.70%	\$ 7,521.25	0.00%	\$ -	\$ 21,271
Post-Doc	313	\$34.31	\$ 10,744.80	25.30%	\$ 2,718.43	0.00%	\$ -	\$ 13,463	131	\$34.31	\$ 4,477.00	26.10%	\$ 1,168.50	0.00%	\$ -	\$ 5,645
GSR	104	\$34.43	\$ 3,594.75	1.80%	\$ 64.71	0.00%	\$ -	\$ 3,659	44	\$34.43	\$ 1,497.81	1.90%	\$ 28.46	0.00%	\$ -	\$ 1,526
Total Direct Labor Hours/Costs	3,132		\$ 203,295.55						1,305		\$ 84,706.48					
Fringe Benefit Cost from Direct Labor Above					\$ 79,818.48			\$ 79,818					\$ 34,232.26			\$ 34,232
Total Fringe Benefit Costs								\$ 79,818								\$ 34,232
Labor Overhead from Direct Labor and FB Above							\$ -	\$ -						\$ -		\$ -
Total Labor Overhead Costs								\$ -								\$ -
Subcontracts/Interorganizational Transfer																
UC San Diego								\$ 1,194,107								\$ 497,545
UC San Francisco								\$ 257,612								\$ 107,339
Subcontract/Interorganizational Name - #03								\$ -								\$ -
Insert line(s) for any additional Subcontractors/Interorganizational								\$ -								\$ -
Total Subcontract Costs								\$ 1,451,719								\$ 604,883
Other Direct Costs																
Materials/Supplies								\$ 19,347								\$ 8,061
Equipment								\$ -								\$ -
Travel								\$ 8,940								\$ 8,940
Animal Related (non-Labor)								\$ 185,191								\$ 77,163
Human Subjects Research (non-Labor)								\$ -								\$ -
Insert line(s) for any other types of ODCs								\$ 18,571								\$ 6,333
Total Other Direct Costs								\$ 232,049								\$ 100,497
Subtotal Costs								\$ 1,966,882								\$ 824,319
General and Administrative (G&A) (See Indirect Rates Worksheet)																
	Base	Rate							Base	Rate						
F&A	\$ 1,966,882.03	0.000%						\$ -	\$ 824,319.03	0.000%						\$ -
F&A minus equipment, GSR tuition/fees & subc	\$ 311,401.00	61.000%						\$ 189,955	\$ 137,938.00	61.000%						\$ 84,142
Primate Center (CNPRC)	\$ 185,191.00	57.800%						\$ 107,040	\$ 77,163.00	57.800%						\$ 44,600
Total G&A Costs								\$ 296,995								\$ 128,742
Subtotal Costs								\$ 2,263,877								\$ 953,061
Total Estimated Costs								\$ 2,263,877								\$ 953,061
Fixed Fee (If proposing a CPFF contract) or Profit	\$ 2,263,877.03	0.000%						\$ -	\$ 953,061.42	0.000%						\$ -
Total Estimated Costs Plus Fixed Fee/Profit								\$ 2,263,877								\$ 953,061

DARPA Direct Cost tabs

To fully translate the OR Budget Template into the DARPA spreadsheet, you would repeat completed steps in the other pertinent **Phase** tabs:

O-I (Phase 2) & Phase 2 TA 1 / O-II (Phase 3) & Phase 3 TA 1



This class will skip these steps. Instead, we'll jump ahead to the **Direct Cost** tabs.

< > Use the **arrows** on the **far left** to scroll along the tab bar to reveal this series of tabs:



These **Direct Cost** tabs are used to provide a breakdown of costs in each section.

- Entries made here do not affect entries in the **Phase** tabs, simply expand on them.

DARPA Travel tab

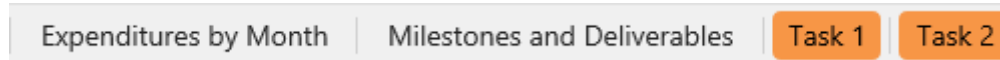
The **Travel** tab is the only tab with auto-calculating gray fields and these provide some challenges:

- The first day and the last day of travel are auto-calculated at 75% of the Meals & Incidental Expenses (M&IE) per diem rate, which differs from common UCD practice.
 - This required us to revise our travel budget, which you can view in the three **Travel Detail** tabs added to the OR Budget Template. Note that each has a $\frac{3}{4}$ **Per Diem** column.
 - There may be other workarounds to accommodate this challenge, but remember that you have indicate all travel costs on DARPA's **Travel** tab.
- It can take some finessing of the **# People, # Days & # of Trips** cells to have DARPA's auto-calculating fields match entries in the OR Budget Template.

Base / Option / Task	Purpose of Trip	Origin Destination	Final Destination	# People	# Days	# of Trips	# days at 100% Hotel per diem	# days at 100% M&IE per diem	# days at 75% M&IE per diem	Round Trip Airfare/ Trainfare per person	Total Airfare/ Trainfare \$ per Trip	Hotel Per Diem Rate per person	Total Hotel Per Diem \$ per trip	M&IE Per Diem Rate per person	100% M&IE Per Diem \$	75% M&IE Per Diem \$	Total M&IE Per Diem \$ per trip	Conference Fees	Other Expenses (taxi, tolls, parking, rental gas, wi-fi)	TOTAL DIRECT DOLLARS PER TRIP	GRAND TOTAL DIRECT DOLLARS FOR ALL TRIPS	
Base		Davis	UCSD	2	1	2	0	0	1	\$107.00	\$ 214.00	\$0.00	\$ -	\$0.00	\$0.00	\$0.00	\$ -		Taxi (\$30x2, 2 ppl)	\$60.00	\$ 274	\$ 548
Base		Davis	UCSF	2	3	2	2	1	2	\$336.00	\$ 672.00	\$333.00	\$ 1,332.00	\$92.00	\$184.00	\$276.00	\$ 460.00		Taxi (\$50x2, 2 ppl)	\$100.00	\$ 2,564	\$ 5,128
Base		Davis	DARPA (DC)	3	3	2	2	1	2	\$372.00	\$ 1,116.00	\$333.00	\$ 1,998.00	\$92.00	\$276.00	\$414.00	\$ 690.00		Taxi (\$50x2, 3 ppl)	\$100.00	\$ 3,904	\$ 7,808
Base		Davis	Chicago	1	4	2	3	2	2	\$227.00	\$ 227.00	\$333.00	\$ 999.00	\$92.00	\$184.00	\$138.00	\$ 322.00	\$500.00	Taxi (\$75x2, 1 prsn)	\$150.00	\$ 2,198	\$ 4,396
							0	0	0	\$ -	\$ -	\$ -	\$ -	\$0.00	\$0.00	\$ -	\$ -			\$ -	\$ -	
							0	0	0	\$ -	\$ -	\$ -	\$ -	\$0.00	\$0.00	\$ -	\$ -			\$ -	\$ -	
Base Total Travel																				Description	\$	\$17,880
Option 1		Davis	UCSD	2	1	1	0	0	1	\$107.00	\$ 214.00	\$0.00	\$ -	\$0.00	\$0.00	\$0.00	\$ -		Taxi (\$30x2, 2 ppl)	\$60.00	\$ 274	\$ 274
Option 1		Davis	UCSF	2	3	1	2	1	2	\$336.00	\$ 672.00	\$333.00	\$ 1,332.00	\$92.00	\$184.00	\$276.00	\$ 460.00		Taxi (\$50x2, 2 ppl)	\$100.00	\$ 2,564	\$ 2,564
Option 1		Davis	DARPA (DC)	3	3	1	2	1	2	\$372.00	\$ 1,116.00	\$333.00	\$ 1,998.00	\$92.00	\$276.00	\$414.00	\$ 690.00		Taxi (\$50x2, 3 ppl)	\$100.00	\$ 3,904	\$ 3,904
Option 1		Davis	Chicago	1	4	1	3	2	2	\$227.00	\$ 227.00	\$333.00	\$ 999.00	\$92.00	\$184.00	\$138.00	\$ 322.00	\$500.00	Taxi (\$75x2, 1 prsn)	\$150.00	\$ 2,198	\$ 2,198
							0	0	0	\$ -	\$ -	\$ -	\$ -	\$0.00	\$0.00	\$ -	\$ -			\$ -	\$ -	
Option 2		Davis	UCSD	2	1	1	0	0	1	\$107.00	\$ 214.00	\$0.00	\$ -	\$0.00	\$0.00	\$0.00	\$ -		Taxi (\$30x2, 2 ppl)	\$60.00	\$ 274	\$ 274
Option 2		Davis	UCSF	2	3	1	2	1	2	\$336.00	\$ 672.00	\$333.00	\$ 1,332.00	\$92.00	\$184.00	\$276.00	\$ 460.00		Taxi (\$50x2, 2 ppl)	\$100.00	\$ 2,564	\$ 2,564
Option 2		Davis	DARPA (DC)	3	3	1	2	1	2	\$372.00	\$ 1,116.00	\$333.00	\$ 1,998.00	\$92.00	\$276.00	\$414.00	\$ 690.00		Taxi (\$50x2, 3 ppl)	\$100.00	\$ 3,904	\$ 3,904
Option 2		Davis	Chicago	1	4	1	3	2	2	\$227.00	\$ 227.00	\$333.00	\$ 999.00	\$92.00	\$184.00	\$138.00	\$ 322.00	\$500.00	Taxi (\$75x2, 1 prsn)	\$150.00	\$ 2,198	\$ 2,198
Option Total Travel																						\$17,880
GRAND TOTAL TRAVEL																						\$35,760

DARPA Last tabs

The 4 last tabs on the tab bar come into play as needed by the project.



Sponsor guidelines will determine whether the **Expenditures by Month** and **Milestones and Deliverables** tabs should be populated, as directed by the PI.

- Neither tab includes instructions.

The **Task** tabs are used if the cost proposal is to be broken down at a more granular level than by **Technical Area**.

- Copy the **Task** tabs as needed for additional tasks.

Recap: Learning Objectives

Hopefully you now:

1. Know helpful concepts that facilitate translating an OR Budget Template into commonly-used sponsor budget forms.
 - i.e., Cayuse 424, Research.gov (NSF), NSPIRES (NASA), FFAST (State of California), etc.
2. Know tips and tricks that aid in translating an OR Budget Template into sponsor-required Excel spreadsheets.
 - i.e., Michael J. Fox Foundation, DARPA, etc.



Contact Us

Let us know how we did:

https://ucdavis.co1.qualtrics.com/jfe/form/SV_4HhzAkhwupoqFTw

GRANT APPLICATION



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UCD Resources

- [OR Budget Templates](#)
- [F&A \(NICRA\) and Fringe Benefit rates](#)
- [Institutional Information](#)
- [Learn: Proposal Budgeting](#)
- [Proposal Budget Handbook](#)
- **Cayuse 424** class: [Instructor-led training over Zoom](#) (next offered 12/4) or [eCourse](#)
- [Preparing a Cost Proposal Budget](#): Slide deck from July 2023 Research Administration Workshop
- [Foundation and Corporate Engagement \(FCE\)](#): Campus unit that works with **corporations** and **foundations**.
- [Meals & Incidental Expenses \(M&IE\) per diem](#) rate

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