

Proposal Budget Development

March 11, 2019 (updated)



Handouts and Outline

Handouts

- Today's Presentation
- Proposal Budget Entry Exercise
- Budget Formula (cards)

Outline

- OR Budget Template Overview
- Budget Entry Exercise
- Resources
- Q&A



OR BUDGET TEMPLATE OVERVIEW

<https://docs.or.ucdavis.edu/spo/>

Template Versions and FAQs

OR Budget Templates and FAQs

File	Description	Last modified
TemplateA_SingleBudget.xlsx	Single budget template for use as a proposal budgeting tool.	February 25 2019 16:55:21
TemplateB_Costsharing_Budget.xlsx	Cost sharing budget template that sums both requested and cost-shared expenses.	March 04 2019 19:05:59
TemplateC_MultiBudget.xlsx	Multi-budget template for use with proposal budgets requiring multiple budgets such as NIH P01s and U54s.	February 25 2019 17:11:03
TemplateD_AB20.xlsx	Budget template for California State Model agreement (AB20) proposals.	February 25 2019 17:11:11
Budget_Sheet_FAQs.pdf	FAQs on budget template use.	October 25 2018 22:58:52
TemplateE_CIRMBudget.xlsx	Budget template for use with CIRM proposals.	February 25 2019 17:11:21

Budget Template Features

- Current rates are included
 - F&A
 - Fringe Benefits
- Can select to Escalate
- F&A Details tab
 - F&A rates, indirect base and indirect costs by budget period
- Personnel Reference tab
 - Use to calculate information for agency forms (Base Salary, Person Months)

Using the OR Budget Templates

Do's

- ✓ Use the current version (download each time)
- ✓ Hide lines
- ✓ Unhide lines
- ✓ Check the calculations
- ✓ Copy and paste values only
- ✓ Paste plain text only

Don'ts

- ✗ Use an old version
- ✗ Delete lines
- ✗ Add lines
- ✗ Write-over or delete formulas
- ✗ Copy and paste formulas or rows from other documents, etc.



BUDGET ENTRY EXERCISE

<https://docs.or.ucdavis.edu/spo/>

Resources

- OR Budget Templates: <https://docs.or.ucdavis.edu/spo/>
- Preparing a Proposal Budget Toolkit: <https://research.ucdavis.edu/wp-content/uploads/Preparing-a-Proposal-Budget-Toolkit.pdf>
- SPO Website - Preparing & Submitting Proposals: <https://research.ucdavis.edu/proposals-grants-contracts/spo/spo-proposal/budget/>



Thank you!

For research-related announcements, you can now follow
SPO on Twitter and YouTube!



@UCDavis
SPO



Sponsored Programs
UC Davis