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
Learning Objectives

After today’s session you should know:

- What the OR Budget Templates are and where to find them
- How to build formulas to calculate:
  - Effort
  - Salary
- How to accurately enter Subawards
  - NIH vs. non-NIH
- How to enter single IRB fees
- Understand how to select and adjust F&A Rates and Bases
OR BUDGET TEMPLATE OVERVIEW

https://docs.or.ucdavis.edu/spo/
## OR Budget Templates and FAQs

<table>
<thead>
<tr>
<th>File</th>
<th>Description</th>
<th>Last modified</th>
</tr>
</thead>
<tbody>
<tr>
<td>TemplateB_Costsharing_Budget.xlsx</td>
<td>Cost sharing budget template that sums both requested and cost-shared expenses.</td>
<td>March 04 2019 19:05:59</td>
</tr>
<tr>
<td>TemplateC_MultiBudget.xlsx</td>
<td>Multi-budget template for use with proposal budgets requiring multiple budgets such as NIH P01s and U54s.</td>
<td>February 25 2019 17:11:03</td>
</tr>
<tr>
<td>TemplateD_AB20.xlsx</td>
<td>Budget template for California State Model agreement (AB20) proposals.</td>
<td>February 25 2019 17:11:11</td>
</tr>
<tr>
<td>Budget_Sheet_FAQs.pdf</td>
<td>FAQs on budget template use.</td>
<td>October 25 2018 22:58:52</td>
</tr>
<tr>
<td>TemplateE_CIRMBudget.xlsx</td>
<td>Budget template for use with CIRM proposals.</td>
<td>February 25 2019 17:11:21</td>
</tr>
</tbody>
</table>
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/
- SPO Website - Preparing & Submitting Proposals: https://research.ucdavis.edu/proposals-grants-contracts/spo/spo-proposal/budget/
Thank you!

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