# Building a Budget

**RESEARCH WEEK 2022** 

### Goals of Workshop

- Identify common budget elements
- Identify common proposal costs
- Introduce cost principles
- General strategies

### Getting Started

#### **Read and understand the solicitation**

- Eligibility
- Due Date
- Awards to be Funded
- Know the limits, requirements and restrictions
  - funds available
  - personnel
  - construction
  - travel
  - cost-sharing or matching



#### Developing a Proposal Budget

The Proposal Budget

- Projects and estimates *project expenses*
- Reflects the *scope of work*
- Demonstrates investigator's *capability to plan and manage* a project

## Direct & Indirect Costs

COMMON PROPOSAL BUDGET CATEGORIES

#### Indirect Costs (Facilities and Administration)

*Necessary costs* incurred by a recipient for a

common or joint purpose benefitting more than one cost objective,

and

*not readily assignable* to the cost objectives specifically benefitted, without effort disproportionate to the results achieved. Examples:

- Utilities
- Custodial services
- General administration
- Research administration
- Libraries
- Accounting
- Purchasing

#### Current Rate Agreement

### On Campus 35% Off Campus 8%

PROV.

#### COLLEGES AND UNIVERSITIES RATE AGREEMENT

EIN: 1741143128A1 ORGANIZATION: St. Mary's University of San Antonio One Camino Santa Maria San Antonio, TX 78228-8513

DATE:11/24/2017 FILING REF .: The preceding

agreement was dated 08/28/2014

The rates approved in this agreement are for use on grants, contracts and other agreements with the Federal Government, subject to the conditions in Section III.

SECTION I	: Facilities	And Admini	strative Cost Rate	s		
RATE TYPES:	FIXED	FINAL	PROV. (PROVISIONAL)	PRED.	(PRED	ETERMINED)
	EFFECTIVE P	ERIOD				
TYPE	FROM	TO	RATE (%) LOCATIO	N	APPI	ICABLE TO
PRED.	06/01/2014	05/31/2018	35.00 On Camp	us	All	Programs
PRED.	06/01/2014	05/31/2018	8.00 Off Cam	pus	A11	Programs
PRED.	06/01/2018	05/31/2022	35.00 On Camp	us	A11	Programs
PRED.	06/01/2018	05/31/2022	8.00 Off Cam	pus	All	Programs

06/01/2022 Until Amended Use same rates and conditions as those cited for fiscal year ending May 31, 2022.

Resource: https://gateway.stmarytx.edu/group/mycampus/services/sparc

#### **Direct Costs**

## Costs that can be identified **specifically** with:

# a *particular sponsored project*, an instructional activity, or any other institutional activity,

#### or

that can be *directly assigned* to such activities relatively easily with a high degree of accuracy.

#### Examples:

- Personnel (salary and fringe)
- Travel
- Materials & Supplies
- Equipment
- Subawards/Subcontracts
- Participant Support
- Other Cost Publication Fees

## How to Plan a Budget

#### **Estimating and Planning**

- Outline proposal activities
- Consider total budget amount allowed\*
- Determine personnel costs usually make up 60% or more of budget
- Negotiate costs for subawards/consultants early in budget planning
- Include evaluation costs (if applicable)

#### Personnel: Build Your Team

How much of *your time* will you need to devote to your proposed project?

Besides yourself, what *faculty or staff are needed* to implement your proposed project?

- Co-Principal Investigator
- Co-Project Director
- Assistant Director
- Project Coordinator
- Administrative Support
- Student Assistant
- Graduate Assistant
- Evaluator

#### Personnel: Level of Effort & Person Months

#### **Faculty**

- 9-month contract, paid over a 12-month period
- 4/4 teaching load

Level of Effort	3-hour Course Equivalent	Person Months 9-month contract
25%	1	2.25
50%	2	4.50
75%	3	6.75
100%	4	9.00

Level of Effort	Hours per Week		
5%	2		
10%	4		
20%	8		
25%	10		

<u>Staff</u>

40-hour work week

Resources: St. Mary's University - Faculty Handbook <u>https://www.stmarytx.edu/policies/academic-affairs/faculty-handbook/</u>. NIH Central Resource for Grants & Funding Information: <u>https://grants.nih.gov/faqs#/person-months.htm?anchor=question50733</u>

### Personnel: Buyouts, Overloads, Stipends & Summer Pay

	Course Buy-Out	Course Overload	Stipends	Summer Pay
AY Teaching Load	Reduced	Same	Same	Same
Compensation	Compensated within contract, at the equivalent of 25% FTE	Compensated above contract, at the established overload rate	Varies – there is not an established stipend scale, issued after work is completed	Compensated above contract during the summer months, at annualized salary
Work is completed	Academic Year	Academic Year	Varies	Summer Term

## Personnel: Fringe Rates

Rate	Category
24%	Faculty – Academic Year Full-time Employees
14.65 %	Faculty – Summer Adjunct Faculty
7.65%	Part-time Employees Student Employees

## Equipment

## Materials & Supplies

*property* that has an acquisition cost of \$5,000 or more <u>and</u> an expected service life of more than one year

Examples: lab equipment

*consumables* to be used in the performance of the sponsored project

Examples: glassware, chemicals, reagents, clinical supplies, laboratory notebooks, and data processing supplies.

#### Travel

## Participant Support

- in-state and out-of-state
- mileage
- airfare
- per diem\*
- lodging
- ground transportation
- conference registration fees

- stipends
- subsistence allowances
- travel allowances
- registration fees

## Subawards & Subcontracts

- Engaged in the research
- Work done by one or more other institutions
- Identify what percentage of the budget be allocated for the work
- Subawardee needs to provide the same budget forms and assurance as the lead institutions
- Put SPARC in contact with your proposed subawardee



Schedule time to review your subaward plans with your Research Administrator

#### Other Direct Costs

- Alterations and Renovations
- Animal costs
- Computer services
- Publication costs
- Other

 Consultant Services/ Contractors – goods or services, not engaging in research

## **Other Considerations**

#### Cost Principles

#### **Reasonable & Necessary**

Would a reasonable person pay \_\_\_\_\_ for \_\_\_\_\_?

#### Allocable

Are these costs specific to this specific grant?

#### **Consistent**

• Are these costs applied consistently regardless of the source of funds?

#### Allowable

• Do these expense conform to the funder's polices?

Resource: Code of Federal Regulations, Subpart E - Cost Principles, <u>https://www.ecfr.gov/current/title-2/subtitle-A/chapter-II/part-</u> 200/subpart-E ; NIH Grants Policy Statement: https://grants.nih.gov/grants/policy/nihgps/html5/section 7/7.2 the cost principles.htm

# Putting the Pieces Together

#### Writing a Budget Justification

- *Align* the budget justification with your narrative
- Justify requested spending
- *Follow agency* budget justification *format*
- *Provide* enough detail to convince reviewers that you
- have included the appropriate resources needed to perform the project
- can implement the project with requested resources

#### Calculating Indirect Costs

Included	Excluded
Salaries and Wages	Equipment
Fringe Benefits	Capital expenditures
Materials & Supplies	Tuition, scholarships & fellowships
Travel	Participant Support Costs
Subaward – first \$25,000 of subaward	Subaward – portion of subaward in excess of \$25,000

### Calculating Direct & Indirect Costs

Example: Consider a solicitation with these instructions:

- The total award available is \$100,000
- The indirect cost rate is 35% of Modified Total direct Costs (MTDC)
- Project does not include equipment, subawards or participant expenses

- **1.** Calculate the amount subject to indirect cost \$100,000
- 2. Divide the modified total costs by 1.x% (where  $$100,000 \div 1.35 =$ **x** = **IDC percentage**). The result is the dollar \$74.074 amount of direct costs
- Subtract direct costs from the modified total 3. costs amount.

The result is the dollar amount of indirect costs.

4. Allocate amounts and check your math. All allocations should add up to the total award amount

\$100,000 - \$74,074 =

\$25,926

\$74,074 **Direct Costs** + \$25,926 Indirect Costs \$100,000 Total Award

### Calculating Direct & Indirect Costs

Example: Consider a solicitation with these instructions:

- The total award available is \$100,000
- The indirect cost rate is 35% of Modified Total direct Costs (MTDC)
- Project proposes to purchase \$8,000 in equipment

1. Calculate the amount subject to indirect cost

\$100,000 Award Available <u>- \$8,000 Equipment</u> \$92,000 MTDC

 $$92,000 \div 1.35 = $68,148$ 

\$92,000 - \$68,148 = \$23,852

- Divide the modified total direct costs by
   1.x% (where x = IDC percentage). The result is the dollar amount of direct costs
- 3. Subtract direct costs from the modified total costs amount. The result is the dollar amount of indirect costs.
- Allocate amounts and check your math. All \$ 8,000 Equipment allocations should add up to the total award amount
   \$ 68,148 Direct Costs + \$23,852 Indirect Costs

\$100,000 Total Award

RESEARCH & RELATED BUDGET - Budget Period 1 OMB Number: 4040-0001	F. Other Direct Costs Funds Requested (\$)	
Delete Period Expiration Date: 1031/2019	1. Materials and Supplies	
ORGANIZATIONAL DUNS: Enter name of Organization:	2. Publication Costs	
Budget Type: Subaward/Consortium Budget Period: 1 Start Date: End Date:	3. Consultant Services	
	ADPCompute Services     Subwards/Consortium/Contractual Costs	
A. Senior/Key Person	6. Equipment or Facility Rental/User Fees	
Months Requested Fringe Funds Prefix First Middle Last Suffix Base Salary (\$) Cal. Acad. Sum. Salary (\$) Benefits (\$) Requested (\$)	7. Alterations and Renovations	
Prefix First Middle Last Suffix Base Salary (\$) Cal. Acad. Sum. Salary (\$) Benefits (\$) Requested (\$)	8.	
Project Role: pp/p1	9.	
	10.	
Add Additional Key Person	Total Other Direct Costs	
Additional Senior Key Persons: Delete Attachment Delete Attachment Vew Attachment Vew Attachment Rey Person in the attached lie	G. Direct Costs Funds Requested (\$) Total Direct Costs (A thru F)	
Total Senior/Key Person	H. Indirect Costs	
B. Other Personnel		
	Indirect Cost Type Indirect Cost Rate (%) Indirect Cost Base (\$) Funds Requested (\$)	
Number of Months Requested Fringe Funds Personnel Project Role Cal. Acad. Sum. Salary (\$) Benefits (\$) Requested (\$)	Add Additional Indirect Cost	
Post Doctoral Associates	Total Indirect Costs	
Graduate Students	Cognizant Federal Agency	
Undergraduate Students	(Agency Name, POC Name, and POC Phone Number)	
Secretarial/Clerical	I. Total Direct and Indirect Costs Funds Requested (\$)	
	Total Direct and Indirect Institutional Costs (G + H)	
Add Additional Other Personnel	J. Fee Funds Requested (\$)	
Total Number Other Personnel Total Other Personnel	K. Total Costs and Fee Funds Requested (5)	
Total Salary, Wages and Fringe Benefits (A+B)	K. Total Costs and Fee Funds Requested (\$) Total Costs and Fee (I + J)	
	L. Budget Justification	
	(Only attach one file.) Add Attachment Delete Attachment View Attachment	
	Add Period	
C. Equipment Description		
C. Equipment Description	RESEARCH & RELATED BUDGET - Cumulative Budget	
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	ACLS	Digital Justice Seed Grant			
		Sample Budget**			
Cateogory	Description	Time Period	Rate	Cost	
	Final Cut Pro X Video/Audio Editing Software			\$300	
otal: Software Licensing & Fees				\$1,350	
quipment				4770	
	HD Camera			\$750	
	External Microphone			\$1,500	
	Ring Lights			\$350	
	External Hard Drive			\$150	
	Tripod			\$100	
Total: Equipment				\$2,850	
Direct Costs					
	Interview Space Rental at API Community	15 hours: October 2022; Febraury			
	Archive	2023			
			\$50/ participant for 25		
	Interviewee Participation Gift Cards	October 2022; February 2023	participants		
	Reseach Carrels for Graduate Assistants	12 months	\$100/month		
	Social Media ads for YouTube Channel	12 months		\$500	
Total: Direct Costs				\$4,075	
Travel & Lodging					
	Train tickets to interview site for PI and	October 2022; February 2023: 4			
	Graduate Assistants	interview/recording sessions	\$35/roundtrip ticket	t \$280	
	PI and Graduate Assistants travel to Digital				
	Humanities Symposium April 2023	April 17, 2023	\$200/ roundtrip ticket	t \$600	
	PI and Graduate Assistants accomodation				
	for Digital Humanities Symposium April				
	2023	April 17-April 19, 2023	\$125/night		
otal: Travel & Lodging				\$1,630	
Base Project Costs				\$22,675	
otal Budget Request				\$22,675	
*Please note that this is only a sa	ample budget. Actual research project categories and bud	lgeted amounts will vary by project.			

## **General Strategies**

- Develop or find a budget spreadsheet that works for you
- Use formulas (Excel)
- Round to whole dollars
- Request a reasonable amount of funds to do the work, not more and not less



Contact your Research Administrator for assistance.

#### **Closing Points**

- Start early
- Ask questions
- Read the solicitation
- Communicate with the agency contact
- Participate in the proposal webinar
- Schedule time to meet your SPARC Research Administrator

# Building a Budget

**RESEARCH WEEK 2022**