

Budget Template Instructions

Saint Louis University
Office of Research Services
March 19, 2008



SAINT LOUIS
UNIVERSITY

About the Template

- Although a detailed budget may not be required for submission with your proposal, the template will still be useful when completing the budget required to be submitted to ORS.
- Many fields will fill-in automatically once base numbers are entered.
- Different sheets are available based on number of years proposed.
- One sheet is blank. No formulas are used, except for totals. Use this sheet if you need to make modifications to the formulas or want to enter numbers manually.
- Extra sheets can be deleted to avoid confusion. If using the sheets with formulas, be sure not to delete the “Rates” tab.



Getting Started

- Talk to the Business Manager or Proposal Helper in your department about your proposal.
- Let your department's ORS representative know that you are going to be submitting a proposal.
- Gather current rates for all salaries to be included in budget.
- Complete paperwork for Tuition Scholarships and Cost-Sharing, if needed.



Rates

	FY 2008	FY 2009	FY 2010	FY 2011	FY 2012	FY 2013
Fringe Benefits (Summer)	13.3%	14.3%	15.3%	16.3%	17.3%	18.3%
Fringe Benefits (FT Faculty)	25.7%	26.7%	27.7%	28.7%	29.7%	30.7%
Fringe Benefits (Staff)	25.7%	26.7%	27.7%	28.7%	29.7%	30.7%
Graduate Health Insurance (per month)	\$175	\$184	\$193	\$203	\$213	\$223
Graduate Tuition (per credit hour)	\$845	\$887	\$932	\$978	\$1,027	\$1,078
Indirect Costs (On-Campus)	47.0%	47.0%	47.0%	47.0%	47.0%	47.0%
Indirect Costs (Off-Campus)	20.8%	20.8%	20.8%	20.8%	20.8%	20.8%

- Calculations on spreadsheets will be made using the “Rates” tab.
- If your proposal **does not** start in the current fiscal year, you will need to make a few minor adjustments to this sheet. If your proposal **does** start during the current fiscal year, you will not need to make any changes to this page.
- Check Research Services’ website periodically for new spreadsheets including updated rates.



Rates

	FY 2008	FY 2009	FY 2010	FY 2011	FY 2012	FY 2013
Fringe Benefits (Summer)	13.3%	14.3%	15.3%	16.3%	17.3%	18.3%
Fringe Benefits (FT Faculty)	25.7%	26.7%	27.7%	28.7%	29.7%	30.7%
Fringe Benefits (Staff)	25.7%	26.7%	27.7%	28.7%	29.7%	30.7%
Graduate Health Insurance (per month)	\$175	\$184	\$193	\$203	\$213	\$223
Graduate Tuition (per credit hour)	\$845	\$887	\$932	\$978	\$1,027	\$1,078
Indirect Costs (On-Campus)	47.0%	47.0%	47.0%	47.0%	47.0%	47.0%
Indirect Costs (Off-Campus)	20.8%	20.8%	20.8%	20.8%	20.8%	20.8%

Change to FY 2009, etc.

Change subsequent titles

14.3%

26.7%

26.7%

Type \$184 here

Type \$887 here

If your proposal does not start during FY2008, you will need to:

- 1) Adjust all 3 Fringe Benefits rows (they will not automatically change across the page). Remember fringe benefits increase by 1% per year. **The following cells in each row will need to be adjusted manually.** They will not change automatically.
- 2) Type the FY2009 (if this is the FY in which your proposal starts) rate for Graduate Health Insurance and Graduate Tuition over the rate in the FY2008 column. The rest of the years will automatically populate. These should increase 5% each year.
- 3) Change the Column titles (e.g. FY 2008) to the correct year.



PI and Co-PI Salaries

	A	B	C	D	E	F	G	H
1		Year 1	Year 2	Year 3	Total			
2	Start of Grant Period	xx/xx/xx	xx/xx/xx	xx/xx/xx			PI Current Salary	100,000
3							9, 10, 11, 12 Month Contract	9
4	A. Senior Personnel						# of Months to be Paid Per Year	2
5	PI Salary	22222	22889	23576				
6	Co-PI Salary	13636	14045	14467				
7	Co-PI Salary	7222	7439	7662			Co-PI Current Salary	75,000
8	Co-PI Salary	0	0	0			9, 10, 11, 12 Month Contract	11
9							# of Months to be Paid Per Year	2
10	B. Other Personnel							
11	Post-Doc Salary	35000	36050	37132				
12	Graduate Student	8000	8240	8487			Co-PI Current Salary	65,000
13	Staff	35000	36050	37132			9, 10, 11, 12 Month Contract	9
14	Undergrad	960	960	960			# of Months to be Paid Per Year	1
15	Total Salaries & Wages	122041	125673	129415	377129			
16								
17	C. Fringe Benefits						Co-PI Current Salary	0
18	PI Fringe	2956	3273	3607			9, 10, 11, 12 Month Contract	9
19	Co-PI Fringe	1814	2009	2213			# of Months to be Paid Per Year	0

- 1) Enter the Grant Period Dates
- 2) Enter your **current** contract amount (if you are not receiving salary from the grant, enter 0)
- 3) Enter the length of your contract (must ≠ 0)
- 4) Number of months per year the grant will pay your salary (can enter decimals for partial months)
- 5) Enter Co-PI's **current** contract amount (if no Co-PIs are being paid, enter 0)
- 6) Enter the length of their contract (must ≠ 0)
- 7) Number of months per year the grant will pay their salary



Other Personnel Salary (Full-time)

10	B. Other Personnel			
11	Post-Doc Salary	35000	36050	
12	Graduate Student	8000	8240	
13	Staff	35000	36050	
14	Undergrad	960	960	
15	Total Salaries & Wages	122041	125673	247714

Post-Doc Salary	35000
Contract Length (# of months)	12
# of Months to be Paid Per Year	12
Grad. Student Stipend- Current Rate	16000
# of Months to be Paid Per Year	9
# of Grad. Students	1
# of Credits Per Year	18
Staff Current Salary	35000
# of Months to be Paid Per Year	4
Undergrad Hourly Rate	\$8.00
# of Hours/week	10
# of Weeks Paid	6
# of Undergrads	2

1

- 1) Fill in the blanks. It will populate the table on the left, just as it did with PI and Co-PI salaries.



SAINT LOUIS
UNIVERSITY

Other Personnel Salary (Full-time)

10	B. Other Personnel			
11	Post-Doc Salary	35000	36050	
12	Graduate Student	12000	12360	
13	Staff	62000	63860	
14	Undergrad	960	960	
15	Total Salaries & Wages	153041	157603	310644

1

- 1) If you have more than one salary rate for Graduate Students, Staff, etc., you should overwrite the formula in the first year of the corresponding budget line with the total salaries for that type of personnel.

Example: You need to budget 2 staff workers on the grant. Both are full-time, but have different duties. One makes \$27,000 and the other makes \$35,000. Therefore, you can overwrite the formula in cell B13 with 62,000. A 3% rate increase will be automatically calculated for the following years.



Fringe Benefits

Fringe Benefits for PI and Co-PIs are automatically calculated at the Part-Time/Summer Rate

17	C. Fringe Benefits			
18	PI Fringe	2956	3273	
19	Co-PI Fringe	1814	2009	
20	Co-PI Fringe	961	1064	
21	Co-PI Fringe	0	0	
22	Post-Doc Fringe	8995	9625	
23	Grad Health Insurance	1050	1103	
24	Staff Fringe	8995	9625	
25	Total Fringe	24770	26699	51468

1) = B5***Rates!B3**

2) Change to = B5***Rates!B4**

Fringe Benefits will be calculated using the rates listed on the “rates” tab of the workbook.

- 1) The spreadsheet is set-up to calculate PI and Co-PI Fringes at the Summer rate (13.3% for FY2008, 14.3% for FY2009, etc.).
- 2) If you need to charge the full-time rate, a formula adjustment will need to be made.
 - * Change “Rates!B3” to “Rates!B4” in the formula. After you have clicked on the first cell:
 - Hit F2
 - Delete “Rates!B3”
 - Click on the Rates tab
 - Click on cell B4 and then hit “Enter”



SAINT LOUIS
UNIVERSITY

Fringe Benefits

17	C. Fringe Benefits			
18	PI Fringe	5711	3273	
19	Co-PI Fringe	1814 ⁺	2009	
20	Co-PI Fringe	961	1064	
21	Co-PI Fringe	0	0	
22	Post-Doc Fringe	8995	9625	
23	Grad Health Insurance	1050	1103	
24	Staff Fringe	8995	9625	
25	Total Fringe	27525	26699	54224

1

17	C. Fringe Benefits			
18	PI Fringe	5711	6111	
19	Co-PI Fringe	1814	2009	
20	Co-PI Fringe	961	1064	
21	Co-PI Fringe	0	0	
22	Post-Doc Fringe	8995	9625	
23	Grad Health Insurance	1050	1103	
24	Staff Fringe	8995	9625	
25	Total Fringe	27525	29537	57062

2

- 1) In order to make the changes work in adjacent cells, move your mouse to the bottom right corner of the cell you just changed. It will turn into a "+".
- 2) Press the left mouse button and drag the mouse to the right until you have highlighted the adjacent cells .



SAINT LOUIS
UNIVERSITY

Total Salaries, Wages & Fringe Benefits

	A	B	C	D
1		Year 1	Year 2	Total
2	Start of Grant Period	xx/xx/xx	xx/xx/xx	
3				
4	A. Senior Personnel			
5	PI Salary	22222	22889	
6	Co-PI Salary	13636	14045	
7	Co-PI Salary	7222	7439	
8	Co-PI Salary	0	0	
9				
10	B. Other Personnel			
11	Post-Doc Salary	35000	36050	
12	Graduate Student	8000	8240	
13	Staff	35000	36050	
14	Undergrad	960	960	
15	Total Salaries & Wages	122041	125673	247714
16				
17	C. Fringe Benefits			
18	PI Fringe	2956	3273	
19	Co-PI Fringe	1814	2009	
20	Co-PI Fringe	961	1064	
21	Co-PI Fringe	0	0	
22	Post-Doc Fringe	8995	9625	
23	Grad Health Insurance	1050	1103	
24	Staff Fringe	8995	9625	
25	Total Fringe	24770	26699	51468
26				
27	Total Salaries, Wages & Fringe Benefits	146811	152372	299182



SAINT LOUIS
UNIVERSITY

- Totals will be automatically calculated.

Equipment, Travel and Participant Support Costs

29	D. Equipment			
30	Item 1	6000	0	
31	Item 2	0	7500	
32	Item 3	0	0	
33	Total Capital Equipment	6000	7500	13500
34				
35	E. Travel			
36	Domestic Travel	2000	2000	
37	Foreign Travel	4000	4000	
38	Total Travel	6000	6000	12000
39				
40	F. Participant Support Costs			
41	1. Stipends	0	0	0
42	2. Travel	0	0	0
43	3. Subsistence	0	0	0
44	4. Other	0	0	0
45	Total Part. Support Costs	0	0	0

- Equipment (capital only)- Enter all equipment that is valued at \$5,000+ per unit with a life expectancy of 2+ years and is non-expendable. (Capital equipment will be automatically removed from the indirect cost calculation.)
- Feel free to change “Item 1”, etc. to the name of the item, so it will be easier to keep track of.
- If you need more than 3 items of capital equipment:
 - Right click on line 33
 - Click “Insert”. A new line will appear below “Item 3”.
 - Add the name of the item and enter the amount.
- Participant Support costs will not automatically calculate; enter each amount separately (they will total in Row 45 and be included in Indirect Costs automatically).



Other Direct Costs

G. Other Direct Costs						
1. Materials and supplies	0	0	0	0		
2. Publication Costs	0	0	0	0		
3. Consultant Services	0	0	0	0		
4. Computer Services	0	0	0	0		
5. Subawards	0			0	# of Subawards over \$25,000	0
6. Other	0	0	0	0		
- Tuition	15210	15971	16769	47950		
Total Other Direct Costs	15210	15971	16769	47950		

- 1) All subawards should be entered here.
- 2) Enter the number of Subawards that are >\$25,000. (If not entered here, they will not be counted in the Indirect Cost calculation.)
- 3) If you can't find another line on the budget for an item, it can be listed under number 6 of Other Direct Costs. Be sure to explain it in your budget justification.



Indirect Costs

57	H. Total Direct Costs (A-G)	174021	181842	180905	536768
58	Indirect Cost Base	152811	158372	164136	475318
59	I. Indirect Cost	71821	74435	77144	223400
60					
61	Amount of Request (H+I)	245842	256277	258049	760167
62	Cost Share Amount	0	0	0	0

Indirect Costs = Facilities and Administrative Costs (F&A)

F&A Costs include, for example, use of space and equipment, depreciation on equipment and facilities, utility costs, financial accounting, departmental administrative costs, and numerous other support services. These costs cannot be easily attributed to individual sponsored research projects, therefore a rate has been calculated.

- 1) Total Direct Costs include all costs in lines A-G.
- 2) Indirect Cost Base automatically excludes Graduate Tuition, Capital Equipment and Subawards (see slide 16 for further info on subawards).
 - Indirect Costs are automatically calculated at the on-campus rate (47%).



Indirect Costs (Off Campus Rate)

57	H. Total Direct Costs (A-G)	174021	181842	180905	536768
58	Indirect Cost Base	152811	158372	164136	475318
59	I. Indirect Cost	71821	74435	77144	223400
60					
61	Amount of Request (H+I)	245842	256277	258049	760167
62	Cost Share Amount	0	0	0	0

1) = B58*~~Rates!B8~~

2) Change to = B58***Rates!B9**

When work on a grant is being performed at an off-campus site, a different rate should be charged for Indirect Costs.

- 1) The spreadsheets are defaulted to charge the on-campus rate (47%).
- 2) If you need to charge the full-time rate, a formula adjustment will need to be made.
 - * Change “Rates!B8” to “Rates!B9” in the formula. After you have clicked on the first cell:
 - Hit F2
 - Delete “Rates!B8”
 - Click on the Rates tab
 - Click on cell B9 and then hit “Enter”



SAINT LOUIS
UNIVERSITY

Indirect Costs on Subawards

57	H. Total Direct Costs (A-G)	174021	181842	180905	536768
58	Indirect Cost Base	152811	158372	164136	475318
59	I. Indirect Cost	71821	74435	77144	223400
60					
61	Amount of Request (H+I)	245842	256277	258049	760167
62	Cost Share Amount	0	0	0	0

Example 1 =(B57-B54-B52-B33)+(H52*25000)+20000

Example 2 =(B57-B54-B52-B33)+(H52*25000)+5000

In order for Subawards, <\$25,000, to have Indirect Costs charged to them, the formula in the first cell of “Indirect Cost Base” will need to include their total (only the first cell of “ICB” will need to change).

Example 1: You have 2 subawards, one for \$15,000 and the other for \$5,000. Since neither of them are >\$25,000, they will not be automatically calculated in the indirect costs. You will have to add \$20,000 to the indirect cost base.

- Add “+20000” to the end of the formula

Example 2: You have 2 subawards, one for \$50,000 and another for \$5,000. You will only need to add \$5,000 to the indirect cost base formula. As long as you have put a “1” in the box for the # of Subawards >\$25,000, the indirect costs on the \$50,000 subaward will automatically be calculated.

- Add “+5000” to the end of the formula.
- If you do not add 5000 to the end of the formula, no indirect costs will be charged to it.



Amount of Request and Cost Share Amount

57	H. Total Direct Costs (A-G)	174021	181842	180905	536768
58	Indirect Cost Base	152811	158372	164136	475318
59	I. Indirect Cost	71821	74435	77144	223400
60					
61	Amount of Request (H+I)	245842	256277	258049	760167
62	Cost Share Amount	0	0	0	0

2

(Example 1) \$6,000

(Example 2) \$7,000

1

- 1) Amount of Request is the total amount per year that you are requesting from the sponsor.
- 2) Enter any approved cost share dollars here. (They will not be included in any calculations.)

Cost Share (Matching Funds) is the amount of money SLU will be spending to support this proposal.

Example 1: Cost sharing is required by the sponsor. Your department head agrees to cost share \$6,000 towards the purchase of a new computer needed to perform the research. You would include that \$6,000 here.

Example 2: The maximum amount allowed to request for the grant is \$5,000. This will only cover the cost of supplies. You will be cost sharing your time on the project, because you will not be getting paid from the grant, but will be getting paid by the university to work on the grant. Your salary for this time is \$7,000. This is the amount that the university is cost-sharing.



SAINT LOUIS
UNIVERSITY

Example 1

- \$250,000 maximum budget
- Project Period 6/1/2008 – 5/31/2010
- PI Salary is \$72,000. He has a 9 month contract and is requesting the sponsor pay for 2 summer months' salary per year.
- 2 Co-PIs will be getting paid.
 - #1- \$60,000 salary, 9 month contract, 1 summer months/year
 - #2- \$85,000 salary, 9 month contract, 2 summer months/year
- 1 Graduate Student
 - Stipend = \$16,000 per year
 - Will work 9 months/year
 - Needs 18 credit hours of tuition
- 2 Undergraduate Students
 - 10 hours/week
 - 8 weeks
 - \$9.00/hour
- Microscope - \$7,500 in Year 1
- Travel - \$1,500 per year domestic
- No Participant Support Costs
- However much supplies money as they can get

Example 2

- Project Period 6/1/2008 – 5/31/2011
- PI Salary is \$80,000. He has a 9 month contract and is requesting the sponsor pay for 2 summer months' salary per year.
- 2 Co-PIs will be getting paid.
 - #1- \$60,000 salary, 9 month contract, 1 summer months/year
 - #2- \$85,000 salary, 9 month contract, 2 summer months/year
- 1 Graduate Student
 - Stipend = \$16,000 per year
 - Will work 9 months/year
 - Needs 18 credit hours of tuition
- 2 Undergraduate Students
 - 10 hours/week
 - 8 weeks
 - \$9.00/hour
- Spectrophotometer - \$12,000
- Travel - \$1,500 per year domestic
 - \$4,000 per year foreign
- No Participant Support Costs
- However much supplies money as they can get
- 2 Subawards
 - #1- \$30,000
 - #2- \$10,000