Tips for Creating a Proposal Budget

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Proposal Budget Topics

• Plan Early
• Who, What, When, Where and Why of a Budget
• Funding Announcement
• Budget Details
# Proposal Submission Policy 74-19

<table>
<thead>
<tr>
<th>Sponsor Deadline</th>
<th>SRA FSURF Internal Deadline for 3-day Rule</th>
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</thead>
<tbody>
<tr>
<td>Monday</td>
<td>The previous Wednesday at 9 A.M.</td>
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<tr>
<td>Tuesday</td>
<td>The previous Thursday at 9 A.M.</td>
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<tr>
<td>Wednesday</td>
<td>The previous Friday at 9 A.M.</td>
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<tr>
<td>Thursday</td>
<td>Monday of the same week at 9 A.M.</td>
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<tr>
<td>Friday</td>
<td>Tuesday of the same week at 9 A.M.</td>
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<tr>
<td>Saturday</td>
<td>Because Saturday is not a business day, it does not count towards the 3-day rule. You should treat Friday as the deadline, so the internal proposal deadline is Tuesday of the same week at 9 A.M.</td>
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<tr>
<td>Sunday</td>
<td>Because Sunday is not a business day, it does not count towards the 3-day rule. You should treat Friday as the deadline, so the internal proposal deadline is Tuesday</td>
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RAMP – Research Administration Management Portal
Who
• Who will be needed to complete the Project
  ◦ Senior/Key Personnel
  ◦ Other Personnel
    ◦ Graduate Students
    ◦ Post Docs
    ◦ Undergraduate Students

What
• What items are needed to complete the Scope of Work
  ◦ Equipment
  ◦ Travel
  ◦ Other Direct Costs
    ◦ Tuition – when Grad student salary proposed
    ◦ Materials and Supplies
    ◦ Publications
    ◦ Subawards
    ◦ Contractors
    ◦ Participant/Trainee Support Cost
Who, What, When, Where, and Why

When
• How long will it take to perform the work?

Where
• Will the PI be traveling to a conference to present research, or to meet with other personnel working on the Project?
• Will the PI need to travel to field locations to complete research?
• Will the work be performed on or off campus.

Why
• All Budgets require a budget justification to explain why these expenses are necessary to perform the work.
Funding Announcement Requirements

- Funding Limit
- Excluded Budget Items
- Period of Funding
AAUW regards the acceptance of a fellowship as a contract requiring fulfillment of the following terms:

- An AAUW American Fellow is expected to pursue her project full time during the funding period (July 1 - June 30). No partial fellowships are awarded. Fellowships may not be deferred. **Fellows may work up to 10 hours a week**, or teach one course per semester or term, with prior written approval from AAUW.

- The AAUW American Fellowships stipend must be larger than any other single fellowship or grant (excluding sabbatical support) received during the year and must be acknowledged as the major award. Acceptance of any concurrent funds of a lesser amount than the AAUW award requires prior written approval from AAUW. Dissertation Fellows **cannot** hold concurrent dissertation writing fellowships or grants. For the **Summer/Short-Term Research Publication Grants** program, it is expected that applicants do not have any other larger grant during the 8 consecutive week period.

- Any major changes in plans for the fellowship year must have the prior written approval from AAUW.

- AAUW must be notified promptly of any change in the status of an application resulting from acceptance of another award.

- Stipend checks are made payable to fellows, not to institutions.

*Dissertation and Postdoctoral Research Leave Fellowships do fund:*

- **Travel to professional meetings, conferences or seminars, as long as it does not exceed 10% of the fellowship**
Dissertation and Postdoctoral Research Leave Fellowships do not fund:

- Research assistants
- Laboratory supplies and equipment
- Publication costs
- Tuition for additional coursework
- Repayment of loans or other personal obligations (fellowships are not retroactive)
- Tuition for a dependent’s education (fellowship funds may, however, be used for dependent care)
Fulbright-Hays Doctoral Dissertation Research Abroad Award

**Budget Instructions:** List, starting with the airport closest to your address, all points of travel related to your proposed project departure from and return to the United States (e.g., Philadelphia, PA - London, UK – Johannesburg, SA - London, UK - Philadelphia, PA). The itinerary should not exceed a 12-month period and must include all countries for which a maintenance allowance is requested.
Budget Details

• How to Organize your Budget

• What needs to be on the Budget Justification
Organize your Budget

Checklist

• Create a checklist of the Who, What, When and Where
  ◦ Use SRA’s Budget Workbook

• Include and Exclude items based on the Funding Announcement

• Create your Proposal Budget in RAMP.
Who

- Senior/Key Personnel – Investigator Eligibility
- Other Personnel
  - Graduate Students
  - Post Docs
  - Undergraduate Students

What

- Equipment
- Travel - Quick Travel Guide Reference

- Other Direct Costs
  - Tuition – Facts Sheet
  - Materials and Supplies
  - Publications
  - Subawards
  - Contractors
  - Participant/Trainee Support Cost
Reasonable
• Are the costs and nature of item reasonable?

Allowable
• Are the cost allowed under Uniform Guidance or the applicable regulatory body for the project?

Allocable
• Are the costs directly assignable to the project?
What needs to be on a Budget Justification

• The Budget Justification will outline all the expenses which were proposed and approved on the project.

• The Expenses should be in the same order as the Budget Details.

• Some agencies have limitations on the length of the Budget Justification.

• Sample Justification
Proposal Budget Resources

Proposal Submission Policy 74-19

RAMP – Research Administration Management Portal

RAM – Research Administration Manual

eSpear Certificate Series

Facts Sheet

Sample Budget Justification

Budget Workbook

Investigator Eligibility

Travel Guides – Controller’s Office
  • Quick Travel Guide Reference