

UCSD Proposal Budget Form Instructions

Overview:

The UCSD Proposal Budget Form was designed to be used for UCSD proposals being submitted to funding agencies that do not have their own specific Budget Form.

In addition, the UCSD Proposal Budget Form is an Excel Workbook providing 5 individual budget years, as well as a cumulative budget page, which automatically adds all budget categories for all years of the budget.

This form provides essential basic information about a proposed budget such as:

- UCSD #
- Salary and Fringe Benefits
- Consultants, Equipment, Supplies and Materials, Travel, and Other Expenses
- Total Direct Costs
- Total Indirect Costs
- Total Costs Requested

Please Note: Due to the numerous formulas contained within the Excel workbook, rounding of numbers may occur, which could cause some totals to round up or round down by one (1). If this does occur, simply go to the "Tools" menu and "unprotect" this workbook and make any necessary number adjustments.

Budget Period / UCSD#:

Budget Period: From Through Year of

Direct Costs:

List Personnel Salary and Fringe Benefits UCSD#

Budget Period From: List the anticipated start date for the project. This is the date that should be used to estimate project expenses for the budget. Agency guidelines may determine the earliest start date that can be selected.

Budget Period Through: List the anticipated ending date for this period of the project. This is generally a 12-month period, but could be less depending on project time lines.

Year of: List the year the budget is for. For example: Year 1 of 1; Year 1 of 3, etc.

UCSD #: List the UCSD # that has been assigned to the proposal.

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Personnel Salary and Fringe Benefits:

List Personnel Salary and Fringe Benefits

Name	Payroll Title	Monthly Salary	# of Months	% Effort	Person Months	Requested Salary	Fringe Benefits Key	Amount	Total
<input type="checkbox"/> Check box for additional personnel. List "Additional Personnel" on next page.									
List Graduate Student Researchers (GSRs) Salary and Fringe Benefits									
# of	Name	Payroll Title	Monthly Salary	# of Months	% Effort	Person Months			
						\$	\$	\$	
						The "Totals" above also include Salary and Fringe Benefit amounts from the next page.			

Requested Salary: The Requested Salary represents the Monthly Salary x the # of Months x the % Effort. The Requested Salary amount will automatically calculate.

Fringe Benefits Key: Select letter: A, B, C, D, or E from the drop-down menu that corresponds to the applicable Fringe Benefit rate for each UCSD position; Academic, Staff, Student, etc. working on the project. This includes the five most commonly utilized Fringe Benefit rates.

Fringe Benefits Amount: The Fringe Benefits Amount represents the Requested Salary x the applicable Fringe Benefit rate; A, B, C, D, or E. As mentioned above, once the appropriate letter has been inserted into the Key column, the Fringe Benefit will automatically calculate. In addition, a final total of all the Fringe Benefit amounts will automatically calculate.

Please Note: Under special circumstances, the use of composite benefit rates may understate actual costs for employee benefits, for example, when the majority belongs to family dental and health plans. In those unique situations, or when a more precise measurement of fringe benefit costs is desirable, budgeting the actual fringe benefit costs, expressed as a percentage of salary, would be warranted in proposal budgets rather than total reliance on composite rates. Should this approach be used however, it must be applied consistently to all named employees, and can clearly not conceptually be utilized for "To Be Named or TBN" employees.

Total: The Total represents the Requested Salary + the Fringe Benefits. The Total amount will automatically calculate. A final Total will also calculate automatically.

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Fringe Benefit Rates Key / Tuition Remission Calculation:

Fringe Benefit Rates Key / Tuition Remission Calculation:				
Enter the appropriate letter from the choices below into the "Key" column.				
A	-	17.0 % Academic Appointee		
B	-	12.7 % Academic Summer Salary -- Appointees Social Security Coordinated		
C	-	22.0 % Staff Employee		
D	-	1.3 % Undergraduate and Graduate Students -- Academic Year		
E	-	3.0 % Undergraduate and Graduate Students -- Summer Months		
Tuition Remission:	# of GSR's:	_____	# of Months _____ x Tuition Remission Rate: _____ = _____	\$
Tuition Remission:	# of GSR's:	_____ x # of Months _____ x Tuition Remission Rate: _____ = _____		
Tuition Remission:	# of GSR's:	_____ x # of Months _____ x Tuition Remission Rate: _____ = _____		
Tuition Remission:	# of GSR's:	_____ x # of Months _____ x Tuition Remission Rate: _____ = _____		

Fringe Benefit Rates Key: The five most commonly utilized Fringe Benefit rates are listed in this key as a reference. For guidance on all the specific Fringe Benefit rates available to be used in proposal preparation, [click here](#).

Please Note: Under special circumstances, the use of composite benefit rates may understate actual costs for employee benefits, for example, when the majority belongs to family dental and health plans. In those unique situations, or when a more precise measurement of fringe benefit costs is desirable, budgeting the actual fringe benefit costs, expressed as a percentage of salary, would be warranted in proposal budgets rather than total reliance on composite rates. Should this approach be used however, it must be applied consistently to all named employees, and can clearly not conceptually be utilized for "To Be Named or TBD" employees.

Tuition Remission: If Graduate Student Researchers (GSRs) are working on the project, please list the # of GSRs x the # of Months x the applicable Tuition Remission Rate. The Tuition Remission amount will automatically calculate. As more than one rate may/will be in effect during the period of performance of the project, two lines have been provided for this calculation. For guidance on Tuition Remission and the applicable rates for your Department/ORU, [click here](#).

Please Note: Tuition Remission is assessed for each academic month, up to nine months (October through June). No assessment is made for the three summer months of July, August, and September.

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Direct Costs:

Consultant(s)					\$
Equipment					\$
Supplies and Materials					\$
Travel					\$
Subaward(s)					\$
Other Expenses					\$
Total Direct Costs					\$

Consultant(s): Separately list the name(s) of the independent consultant(s) plus their daily rate of pay and the number of days they will work on the project. For example: John Smith, \$50 per day for 15 days. Costs intended to cover travel and per diem of bringing such outside consultants to UCSD are also to be included in this category; these are listed separately from the daily rate and number of days information. For detailed guidance on Consultants, [click here](#).

Equipment: Separately list each item of equipment, and its dollar value, that is being requested for the project. For detailed guidance on Equipment, including definition, sales tax, shipping costs and assembly, as well as fabrications and leasing of equipment as it pertains to proposal preparation, [click here](#).

Supplies and Materials: Separately list each item of supplies and materials, and their dollar value that is being requested for the project. Examples of items to be budgeted in this category include consumables such as chemicals, glassware, etc.; animal purchases, repair parts/replacement components for equipment items; computer software. For detailed guidance on Supplies and Materials, [click here](#).

Travel: List the costs associated with the required travel of UCSD personnel working on the project. The following aspects of each trip should be outlined: the purpose and specific destination, if known, of each trip, the number of individuals going on each trip, the mode and cost of transportation to be used, the number of days of per diem and the per diem rate. For example: Travel for the Principal Investigator to attend the National Academy of Sciences annual conference in Washington, D.C. Air fare \$400 round trip; conference registration fees \$350; per diem \$50 per day for 3 days. For detailed guidance on Travel, [click here](#).

Subaward(s): List the name of the outside, non-UCSD entity that will be performing a portion of the project. List the subaward site's total costs, which include their direct and indirect costs. For detailed guidance on Subawards, [click here](#).

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Direct Costs - Continued:

Consultant(s)					\$
Equipment					\$
Supplies and Materials					\$
Travel					\$
Subaward(s)					\$
Other Expenses					\$
Total Direct Costs					\$

Other Expenses: List each item of other expenses, and their dollar value, that are being requested for the project. Examples of miscellaneous items include publication costs, animal care per diem, rent/lease costs for off-campus non-UCSD owned space, etc. Additional key components of other expenses include Next Generation Network communications/computing costs, Patient Care costs, Purchase Orders for Services, Participant Support Costs for the National Science Foundation (NSF), etc. For detailed guidance on Other Expenses, [click here](#).

Total Direct Costs: This is the total of all of the Direct Cost categories. The dollar amount will automatically total from the totals of Salary and Fringe Benefits, Consultant(s), Equipment, Supplies and Materials, Travel, Subaward(s), and Other Expenses.

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Indirect Costs:

Indirect Costs:

On Campus Federally-Negotiated Rate(s)	%	x	MTDC Base:	=	=	Total Indirect Costs	\$
			MTDC Base:	=			
Off Campus Federally-Negotiated Rate	%	x	MTDC Base:	=			
Other Rate	%	x	Base:	=			

On Campus Federally-Negotiated Rate(s): List the On Campus Federally Negotiated Indirect Cost Rate(s) for the project and the dollar value of the base. For UCSD's Federally Negotiated Rates, the Modified Total Direct Costs (MTDC) base is defined as the dollar amount of direct costs that **do** have indirect costs assessed on them.

Off Campus Federally-Negotiated Rate: List the Off Campus Federally Negotiated Indirect Cost Rate(s) for the project and the dollar value of the base. For UCSD's Federally Negotiated Rates, the Modified Total Direct Costs (MTDC) base is defined as the dollar amount of direct costs that **do** have indirect costs assessed on them.

Please Note: For detailed guidance about UCSD's Federally Negotiated Indirect Cost Rates including how the base is determined, [click here](#).

Other Rate: For guidance about Indirect Cost Rates for all other agencies other than the Federal Government and For-Profit Industry, [click here](#).

Total Indirect Costs: If multiple On-Campus Federally Negotiated Rates were used, the subtotal from each base calculation will automatically total. If only one rate was used, for either Federally Negotiated On-Campus or Off-Campus, or an Other Rate such as with a non-profit agency, the total dollar figure calculated in the Indirect Costs category will be listed again in the Total Indirect Costs category.

Total Costs Requested:


Total Costs Requested

\$

Total Costs Requested: This represents Total Direct Costs + Total Indirect Costs. The dollar figure will automatically calculate.

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All budget year(s) will auto-populate and total onto the "Cumulative" worksheet, as shown below.

Cumulative Budget:

Cumulative Budget Period: **From** **Through**

UCSD#

	Year 1	Year 2	Year 3	Year 4	Year 5	Cumulative
Salaries	-	-	-	-	-	-
Fringe Benefits	-	-	-	-	-	-
Tuition Remission	-	-	-	-	-	-
Consultant(s)	-	-	-	-	-	-
Equipment	-	-	-	-	-	-
Supplies and Materials	-	-	-	-	-	-
Travel	-	-	-	-	-	-
Subaward(s)	-	-	-	-	-	-
Other Expenses	-	-	-	-	-	-
Total Direct Costs	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -

Total Indirect Costs	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
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Total Costs Requested	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
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