Instructions for completing a Simple Spreadsheet Budget

The Research Office will prepare budgets (including most sponsor forms). If you have and/or are interested in preparing your own budget(s), the following spreadsheet links could be useful. Sample spreadsheets for a one year, three year and five year budget are linked. Keep in mind that the budget templates are for “simple line items budgets” and will not reflect unusual line items and/or multiple PIs, sub-contracts and or other specialized items that could be unique to your particular budget proposal. If your budget has those types of specialized items and/or you would like the Research to prepare the budget, just contact the Research Office.

Click on the following link for the specific budget spreadsheet you would like to work with:

1) [One year budget spreadsheet]
2) [Three year budget spreadsheet]
3) [Five year budget spreadsheet]

The budgets are designed for one PI, up to 2 Co-PI’s, (with each calculating effort based on summer salary), GRA’s (either 9 month or 12 months) and one “other salary” position along with the “standard detailed budget categories (travel, supplies, publication costs, consult services, tuition and other costs).

The spreadsheet also includes (and calculates) the university’s current (and future) indirect cost rate(s), based on overall project start/end dates and related fringe benefits.

Mechanical Steps:

1) Cell D2: Key in Proposal Title (Official name of project)
2) Cell D3: Key in total # months project is covering
3) Cell D4: Key in start and end dates of proposed project
4) Cell G3 and H3: Count the number of months from actual project start date to the end of 09/30/2015; then key in actual number of months (If project starts 01/01/2015, then the number of months under the IDC base-cell G would be 9; the reminder of year (3) would be keyed into cell H3). The total would always equal 12. Out years (if applicable would calculate accordingly.
5) Cell C10, 11 & 12: using the edit function (F2), key in the summer portion of salary for PI and Co-PI’s (as applicable) being careful not to modify the existing formulas in the cell. This will ensure that the calculations will carry throughout the time period of the proposal.
6) Cells F10, 11 & 12: input the effort for each position being requested.
7) Cell C14 & 15: both cells are prefilled with the amount for each GRA. Adjust as needed.
8) Cells C32, 35, 36, 41-44, 48-50, 52 & 54 are the line items to be used for each category that is being requested for your proposal. NOTE: Cells B53, C 53, C 54 & D53 are prefilled for tuition costs which are based on the number of GRA’s needed for your proposal. Key in that number in Cell D53.
9) The budget template is now complete. Review for errors and/or changes. Forward to your Grants Admin Person for concurrence and approval.