

# **Budget Webinar Overview**

## **Purpose:**

 Provide support for writing clear, solid budgets, that align proposals with equity in mind

## Agenda:

- Reminders about the AISL Program (Part 1)
- Attending to equity in a proposal & budget (Part 1)
- Preparing a budget and budget justification (Part 1)
- Budget preparation, line by line, including budget justification (Part 2: A-F)
- Budget preparation, line by line, including budget justification (Part 3: G)
- Common budget pitfalls & related documents (Part 4)
- New: NSF guidance on receiving NSF funding (Part 4)



# Budget categories, line by line

# Budget Lines A-C: Personnel & Fringe Benefits

Does the budget justification align with the descriptions of the roles & responsibilities in the project description? Does it embody equitable practices?

- Lines A-C are for *employees* of the organization only.

  All employees of the organization who are involved in the project should be included here.
- Describe the role of each person to be supported by the grant, i.e., PI, Co-PI, Senior Personnel, postdocs, grad students, undergrads, secretarial, other

#### A. Senior Personnel

- There is a budget cap of 2 calendar months/year across <u>all</u> NSF-funded projects for Senior Personnel, as it is assumed that time spent on research is included in a faculty member's salary
- Exceptions may be made; need to explain why in the justification. This is common for soft money orgs, not research institutions, etc.

#### **B. Other Personnel**

#### **C. Fringe Benefits**

 Indicate how fringe benefits are calculated for each person/role in the project

SUMMARY		<u>AR</u>	1			
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RGANIZATION PROPOSA			POSAL			
Test Institution					osed	Grante
PRINCIPAL INVESTIGATOR / PROJECT DIRECTOR	_	AV	VARD N	Ю.		
A OFFICE PERSONNEL PURP OF DE FONTE AND OFFICE AND INC.		NSF Fund	ad.	Funds	_	Funds
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1. Jane Smith - Chief Technical Officer	4.00	Α.	Ser	nior Pe	ers	sonr
2. John Doe - Senior Engineer	4.00	0.00	0.00	25,0	nnn	
3.	4.00	0.00	0.00	20,0	000	
4.						
5.						
6. ( 0) OTHERS (LIST INDIVIDUALLY ON BUDGET JUSTIFICATION PAGE)	0.00	0.00	0.00		0	
7 / 2) TOTAL SENIOR DEPSONNEL (1-8)	8.00	0.00	0.00	57,0	000	
B. OTHER PERSONNEL (SHOW NUMBERS IN BRACKETS)				, and the second		
	0.00	0.00	0.00		0	
2. ( 3) OTHER PROFESSIONALS (TECHNICIAN, PROGRAM TR, ETC.)	10.00	0.00	0.00	38,0		
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#### A. Senior Personnel

Funding in the amount of \$XX in salaries is requested for the four-year period of this project (Y1: \$X; Y2: \$X; Y3: \$X; Y4: \$X). This budget covers staff time for the work of XXX & CCC.

A1. XXX will serve as PI and liaison to YYY. She will provide project oversight, take the lead on the quantitative research aspects of the project, and guide the Advisors. She will devote XX hours to the four-year project (Y1 = 264 hours, Y2 = 536, Y3 = 280, Y4 = 416). A X% annual cost-of-living increase has been included in the salary calculation.

A2. ;alksdjf;aslkdjf;sdlkjfds

YYY is an independent cultural institution that does not have academic teaching requirements of our research team. We request that the full project effort of XX be funded at a level of two months or more in order to complete the proposed scope of work for this project and for her other NSF-supported work.

#### **B.** Other Personnel

SUMMARY	Y	E <u>AR</u>	1			
PROPOSAL BUDG	<u>ET</u>		FOR	FOR NSF USE ONLY		
ORGANIZATION PROPOSA			POSAL		ON (months)	
Test Institution		Salatina wasan Karapanya		Proposed	Granted	
PRINCIPAL INVESTIGATOR / PROJECT DIRECTOR		AWARD NO		O.		
A. SENIOR PERSONNEL: PI/PD, Co-Pl's, Faculty and Other Senior Associates	-	NSF Funde	ed	Funds	Funds	
A. SENION FERSONNEL. FIFB, CO-FTS, I acuity and Other Senior Associates	CAL	ACAD	SUMR	Funds Requested By proposer	Funds granted by NSF (if different)	
1. Jane Smith - Chief Technical Officer	4.00	0.00	0.00	32,000	() amorony	
2. John Doe - Senior Engineer	4.00	0.00	0.00	25,000		
3.						
4.						
5.						
6. ( 0) OTHERS (LIST INDIVIDUALLY ON BUDGET JUSTIFICATION PAGE)	0.00	0.00	0.00	0		
7 / 9 TOTAL SENIOR DEPSONNEL (1 - 6)	8.00	0.00	0.00	57,000		
B. OTHER PERSONNEL (SHOW NUMBERS IN BRACKETS)						
	0.00	0.00	0.00	0		
2. ( 3) OTHER PROFESSIONALS (TECHNICIAN, PROGRAMMER, ETC.)	10.00	0.00	0.00	38,000		
3. ( 0) GRADUATE STUDENTS				0		
4. ( 0) UNDERGRADUATE STUDENTS  5. ( 0) SECRETARIAL - CLERICAL (IF CHARGED DIRECTLY)				Benefi 95,000	ts	
5. ( 0) SECRETARIAL - CLERICAL (IF CHARGED DIRECTLY)  6. ( 0) OTHER		- F.	inge	Benen	Co	
TOTAL CALIFORNIA WAGES VI - BY	<del>-</del> (	C. Fr	1116	95 000		
C. FRINGE BENEFITS (IF CHARGED AS DIRECT COSTS)	<u> </u>			19,000		
,				114,000		
D. EQUIPMENT (LIST ITEM AND DOLLAR AMOUNT FOR EACH ITEM EXCEED	ING \$5,0	000.)				
E. TRAVEL 1. DOMESTIC (INCL. U.S. POSSESSIONS)				0		
	<i>E.</i> '	Trav	e <b>l</b>	4,000		
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#### C. Fringe Benefits

- Can cover medical, dental, and vision coverage for employees
- Rates are based on company records, is 20% of direct labor costs. E.g., requested fringe benefits = 0.20 \* \$95,000 (total direct labor) = \$19,000

## D. Equipment

Alskdjf;alskdjf;askldjfsal

#### E. Travel

;alkdjfa;lskdjf;alskdjf;aslkdjf

# Budget Line D: Equipment

Rare expense type.

If the item doesn't cost >\$5K, it doesn't belong in line D.

- Equipment is considered any individual item of >\$5,000
- It is also typically, "Tangible personal property (including information technology systems) having a useful life of more than one year."
- If requested, must be essential components of proposal deliverables.
- It may **not** include: Capital or general operating expenses; purchase of major office equipment, or vehicles

# Budget Line E: Travel (Part 1)

Who gets to travel? Why?
Who isn't traveling? Why?
What does travel say
about who's work is valued
and who can represent the
project? Who gets to learn
about the project, based
on where the travel is to?

- Line E only support travel of *employees* of the submitting institution. Travel for others is covered elsewhere.
- Typically used to cover travel to team meetings, data collection sites, and conferences/workshops to share findings.
- Must be specified, itemized and justified
  - Specify for what purpose, location, and name of the event, if there is one
  - Itemize flight, hotel, ground, per diem, etc. based on gsa.gov or your institution's travel policy.

# Budget Line E: Travel (part 2)

Who gets to travel? Why?
Who isn't traveling? Why?
What does travel say
about who's work is valued
and who can represent the
project? Who gets to learn
about the project, based
on where the travel is
going to?

# Include biennial AISL Awardee meeting in/near DC for 2 days in even years (next is 2025) for the PI and a community member

- It is acceptable to include a travel day on either end, depending where you are coming from
- Must travel on US-Flag Air Carriers (US airlines)

# NSF staff look closely at travel budgets: Is it equitable? Excessive? Reasonable? Justified?

• This line item is not intended to support travel for participants, consultants, advisors, or others who are not employees of the submitting institution.

#### E. Travel:

Funds in the amount of \$XXX are requested for travel for project team meetings and dissemination. Estimates for travel are based on average costs to major cities that host professional conferences, using GSA.gov for hotel and meal per diem information.

Estimated costs were calculated as: airfare at \$600/trip, hotel at \$250 per night, \$65 per diem for meals, and ground transportation at \$50 per trip. Actual amounts will comply with federal limits and regulations. [This can also be done as a table.]

Funds are requested for PI and community partner to attend the AISL Awardee meeting at NSF (2 nights/3 days): \$600 flight + 2\*250 hotel +2(65\*.75) M&IE travel days + 65M&IE \$50 ground transportation=XXX

Travel funds are requested for PI and 2 graduate students to travel to the XXX conference. This will serve as a face-to-face project meeting for the to present results of XXX, supporting dissemination, and XXX. This travel is budgeted for 3 nights/days (1 day for project meeting, 1 day of presentations, 1 day of travel). Year 3 - \$additional conference day is due to increased presentation responsibilities in this final project year. (Show calculation)

CoPI X and 3 youth will attend 1 additional conference (4 nights/days) to extend the dissemination to new audiences and grow new relationships in the field. (Show calculation)

# Budget Justification

Specify location & purpose

Itemize expense estimates



# Line F. Participant Support

Who are the, participants, and/or trainees?
How are people involved in the proposed work?
How are they compensated?

# What is Participant Support?

Direct costs for items such as stipends or subsistence allowances, travel allowances, and registration fees paid to or on behalf of *participants or trainees* (*not* **employees, consultants, advisors, etc.**) in connection with NSF-sponsored conferences or training projects.

# Participant Support Budget Lines

F1. Stipends
F2. Travel
F3. Subsistence
F4: Other

Who are informal STEM
learners, participants,
and/or trainees in the
project? What supports do
they need to fully
participate?

- Covers stipends or subsistence allowances, travel allowances, and registration fees paid to or on behalf of project participants or trainees only in connection with conferences, training, or project activities.
- Participant support costs must be specified, itemized, and justified in the budget justification section of the proposal.
- This is not entertainment \$. There isn't entertainment \$ in NSF budgets.
- Do **not** include incentives for participation in research in this line. Incentives should be listed in G6: Other.
- Explain why the people are considered participants. What are their roles in the proposed work?

# F. Participant Support Examples

- Do not include project staff, those providing services to the project, such as consultants, advisors, or other professionals, or employees of the submitting institution. These are not Participants.
- No entertainment. No entertainment.
- How should student employees be budgeted?
  - A student cannot be compensated partially as an employee and as a participant on the same grant
  - It is up to the proposing organization to determine—and provide a rationale—for whether they should be a student employee, or a participant based on the role of the student in the project

# F. Participant Support (# of participants)

- **1. Stipends:** Add itemization & rationale details
- **2. Travel:** Bus cards/fare, other travel
- 3. Subsistence: Refreshments for programming during mealtime; working meals if necessary—avoid dinners if travel is not involved
- **4. Other:** Childcare; workshop registration



# Participant Support Budget Justification

#### F1 Stipends

• \$XXX for educator participation in Professional Learning (40hrs learning series); \$XX pp (40hrs x \$X/hr) x 10 people Y1 and 60 people Y2&3

#### **F2** Travel

• \$XXX requested for travel to participate in-person portion of Professional Learning Y1&2

Explain
compensation
rate

Specify location & purpose

**GSA.gov** 

Travel to San Francisco for Professional Learning Experience,	Total
2days/3nts, 40p (Y1&2): 20 by air; 20 by car	Y1&2
Airfare: \$350/person x 20 people	\$7,000
Mileage: avg 280 mi rt @\$0.55/mi x 20 people	\$3,080
M&I not covered at workshop: \$30pp x 40 people	\$1,200
Lodging: \$270/night x 3 nights x 40 people	\$25,200
Air travel parking & ground transportation: \$150pp x 20 people	\$3,000

#### F3. Subsistence

During the convening in Boston, participants are budgeted for a working breakfast (with agenda) @\$X per person and a working lunch (with agenda) @\$X per person (\$X/person per day x 2 days = \$X/participant x 44 participants = \$X)

Participant
Support Budget
Justification

\*per diem meal costs estimated based off of 2019 per diem rates for Boston/Cambridge from GSA.gov; lodging costs are estimated based on rates negotiated by PI institutions with local hotels.

Specify location & purpose

For youth programs, refreshments at \$4/person are requested as....

Itemize expense estimates

F4. Other

**GSA.gov** 

Childcare is likely needed for X people for X days, at \$X/hour....