

# Proposal Budget Form

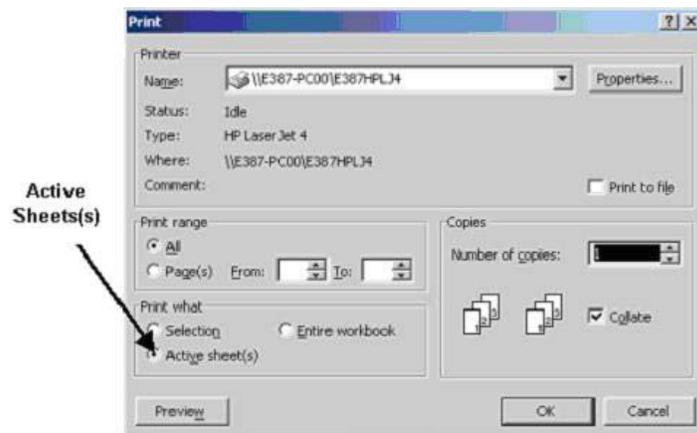
## Instructions

**Save:** Save the Proposal Budget Form to a disk, or your computer's hard drive, before entering any information. Remember to access the current version of this form each time you begin a new budget, since certain rates may change. **Note:** It is recommended to save all documents frequently while working on them.

Download the [Proposal Budget Form](#) Excel File.

**Print:** The Proposal Budget Form has been set to print only the form itself, for each individual worksheet. You can either print each worksheet separately, or you can print all five years plus the cumulative sheet by selecting the **Active Sheets** radio button in the **Print What** section of the **Print** pop-up menu. (**Fig. 1**)

**Figure 1**



## Contents:

**Project Title:** Enter the Title for the project. This title will then be inserted automatically into subsequent budget years.

**Principal Investigator:** Enter one name for the Principal Investigator of the project. This name will also be inserted into subsequent years.

**A. Senior Personnel:** Enter the following fields for each senior person (PI and Co-PIs) involved with the project.

- **First:** First Name
- **MI:** Middle Initial
- **Last:** Last Name
- **Title:** Title for project (PI or Co-PI)
- **Salary Rate:** Annually Salary, based on either 9 or 12-month basis.
- **CAL:** For 12-month basis salary personnel, the number of months funded by this project.

- **ACAD:** For 9-month basis salary personnel, the number of academic months funded by this project.
- **SUMR:** For 9-month basis salary personnel, the number of summer months funded by this project.

*The Proposal Budget Form will automatically calculate the funds required for each senior personnel based on their annual salary and months funded.*

## **B. Other Personnel:**

### **1. Post Doctoral Associates:**

- Use the pull-down menu to select whether this person is a **research associate** or **project assistant**.
- Enter the **Number of** Post Doctoral Associates funded by this project.
- Enter the **Total Person Months** for Post Doctoral Associates funded by this project.
- Enter the total **Salary** needed for Post Doctoral Associates. Since rates vary for these persons, you will need to either calculate this figure beforehand, or use the *Other Personnel Calculator* available on each budget worksheet to the right of the funds column. By entering the monthly rate and total person months, this calculator will provide you with the total funds needed.

### **2. Other Professionals:**

- Use the pull-down menu to select whether this person is a **Faculty** member or a **Technician**. Notice that the technician's fringe benefits rate is higher, and that this category should be used only for full-time technicians already employed by UWM that will be funded by this project (examples include the technicians in the machine shop on the 2nd floor of the EMS Bldg).
- Enter the **Number of** Other Professionals funded by this project.
- Enter the **Total Person Months** for Other Professionals funded by this project.
- Enter the total **Salary** needed for Other Professionals. Since rates vary for these persons, you will need to either calculate this figure beforehand, or use the *Other Personnel Calculator* available on each budget worksheet to the right of the funds column.

### **3. Undergraduate Students (Hourly):**

- Enter the **Number of** Undergraduate Students funded by the project.
- Enter the total **Salary** for Undergraduate Students.

### **4. Classified Staff** (referred to on the NSF budget forms as 'Secretarial'):

- Enter the **Number of** Classified Staff funded by the project.
- Enter the total **Salary** for Classified Staff.

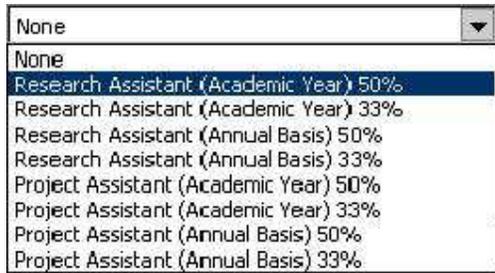
### **5. Other:**

- Enter the **Number of** Other persons funded by the project.
- Enter the total **Salary** for Other persons.

## **C. Graduate Students:**

- Use the pull-down menu (**fig. 2**) to select the classification of graduate student(s) funded by the proposal.

### **Figure 2**



- **Research or Project Assistant?**  
While both research and project assistants receive their stipends and a 25% non-resident fee remission, project assistants also receive a full remission of regular, resident tuition, while earning a smaller stipend.
- **Academic Year or Annual Basis?**  
This depends on whether the graduate student will be employed by this project during the entire year, or only for the 9-month school year.
- **50% or 33%?**  
Graduate students can either be employed on either a 50% or 33% basis.
- Enter the **Number of** graduate students employed by the project, corresponding to each different classification.

*The Proposal Budget Form will automatically provide you with the stipends and tuition remission rates needed for each graduate student, based on the current figures provided by the university, with projected increases for each year.*

*After completing these sections, you will be provided with the Total Salaries and Wages, Fringe Benefits, and Fee Remissions, as well as a combined total, for all personnel funded by the proposal.*

**D. Equipment (over \$5,000):** Enter the item and funds needed for each piece of equipment over \$5,000.

**E. Travel:** Enter the funds needed for both Domestic and Foreign travel.

**F. Participant Support Costs:**

1. Enter the total number of participants.
2. Enter the Stipends needed to fund all participants.
3. Enter the Travel expenses for all participants.
4. Enter funds need for Subsistence for all participants.
5. Enter Other funds needed for participants.

**G. Other Direct Costs:**

1. Enter the funds needed for **Materials and Supplies**.
2. Enter the funds needed for **Publication Costs, Documentation and Dissemination**.
3. Enter the funds needed for **Consultant Services**.
4. Enter the funds needed for **Computer Services**.

5. **Subawards:** The Proposal Budget Form allows you to enter the name and total yearly funds requested for up to 3 different subcontractors. This ensures that only the first \$25,000 of each subaward is charged facilities and administrative (indirect) costs.
6. Enter the total **Other** costs requested by the proposal.

*The Proposal Budget Form will automatically calculate the Total Direct Costs.*

**H. Facilities & Administrative (Indirect) Costs:** Use the pull-down menu to select between Research, Instruction or Public Service. The rates used are for all projects beginning after July 1, 2003. These rates are applied to:

- Total Salaries and Wages
- Fringe Benefits
- Total Participant Costs
- Materials and Supplies
- Publication Costs/Documentation/Dissemination
- Consultant Services
- Computer Services
- Other Direct Costs
- The first \$25,000 of each subaward

*The Proposal Budget Form will total the Direct Costs and the F&A costs.*

**I. Cost Sharing (from the online T-Form at <http://ceas-dev.imt.uwm.edu>):** The total Cost Sharing figure should be the same as the figure used when filling out the online Transmittal Form at <http://ceas-dev.imt.uwm.edu>

*The Proposal Budget Form is now complete, providing you with a Total Project figure. Be sure to save the completed form.*

*To fill out subsequent years, select the next year from the tabs at the bottom of the screen. For multi-year projects, there is also a tab that provides you with Cumulative totals.*

**5% Salary Increase Calculator:** The salaries of all personnel should include a 5% increase for future years. This "calculator" does not print, and is for your convenience. To use: Enter the year 1 salary and press enter to see the increased amounts to be used for future years.

**Other Personnel Calculator:** This "calculator" can be used to figure **Salary** for Post Doctoral Associates and Other Professionals. Simply enter the Monthly Rate and the Total Person Months (as long as each person is receiving the same monthly salary). These figures will be multiplied, and the total Salary will be given.