Sample Budget Instructions

We encourage you to use this sample budget template. If you choose not to use this format, please ensure that your format is easy to use and provides information in the same general categories. Regardless of the format, please also include a budget narrative with your proposal

If you are using this document to create your budget, please read the important information below to ensure you can fully navigate the sample budget. If you have questions once you review this guidance, you may also contact the program officer responsible for this competition.

IMPORTANT INFORMATION ABOUT THIS DOCUMENT

1) There are five worksheets in this sample budget document: (1) Sample Budget Instructions (this worksheet); (2) Total Cost by Grant Category; (3) Summary Budget; (4) Admin Detailed Budet and (5) Program Detailed Budget. You can navigate between these worksheets by clicking on the tabs near the bottom of the document. We do not provide a template for the requested budget narrative.

2) In order to share information about the budget recommendations and requirements, we have created comments. Comments appear as boxes with a yellow background on your screen. There is an arrow from the comment to the cell that it is associated with. Each cell with a comment also has a small red triangle on the upper right hand corner of the cell. Currently all comments should be shown. Once you have reviewed all of the comments, you may wish to hide them. To hide all comments, select the "Review" menu at the top of the screen. There you should see a button that says "Show All Comments" which you can unselect to hide all the comments and select again to make all the comments reappear. If you do not have this button or menu option, use the software's help feature to find out where this feature is on your version of the software. You are also able to view individual comments by hovering your mouse over the cell that has the comment you wish to review. Please be sure to review all of the comments as they contain important information about the budget.

3) You may add and delete lines anywhere in the Detailed Budgets depending on your needs. Please ensure that you explain all of your budget details clearly and concisely in your budget narrative, particularly if you have made budgeting decisions that depart from the suggestions in the NOFO or POGI.

4) Some cells are set up to auto calculate based on values that you fill in. For example, once you fill in the amount of staff member #1's salary covered by the grant (in the Requested Federal Funds column) and the amount covered by cost-share (in the Cost-Share by Applicant column), the Program Total column will automatically add those two values together. You can tell which cells will automatically fill in because they have a $ in them before you enter anything in the spreadsheet.
While we have done our best to ensure that this auto fill feature is useful and accurate, it is your responsibility to check the math to ensure that the calculations are accurate and account for all line items in your budget.

5) The Summary Budget also has auto fill features both for the Year One budget (which is drawn from your entries on the Detailed Budget worksheet) and for the per participant costs. For the per participant costs to calculate, you will need to fill in the number of participants in the rose colored boxes. The number of participants remains the same each year and is specified in the NOFO and POGI. As with the detailed budget, it is your responsibility to check the math and ensure these automatic calculations are correct.

Total Cost by Grant Category
Study of the U.S. Insitute
Organization Name
Project Title
Budget Duration

	Federal Funds
1 Personnel	
2 Fringe Benefits	
3 Travel	
4 Equipment	N/A
5 Supplies	
6 Contractual	
7 Construction	N/A
8 Other Direct Costs	
9 Total Direct Costs	
10 Total Indirect Costs	
11 Total Project Cost	
Cost Share	
PROGRAM COSTS	
ADMIN COSTS	

* line item amounts auto-fill from "Admin and Program Detailed Budget Template" tabs

	Study of the U.S. Institute
	Insert Title
	Summary Budget
	Insert Applicant Name

Period	Description	Funds Requested from ECA	Cost Share Funds	Total Costs	
Year One					
	Participants				
	Administrative Costs	$	$	$	-
	Program Costs	$	$	$	-
	Total Costs	$	$	$	-
	Administrative Costs Per Participant	#DIV/0!	#DIV/0!	#DIV/0!	
	Program Costs Per Participant	#DIV/0!	#DIV/0!	#DIV/0!	
	Total Costs Per Participant	#DIV/0!	#DIV/0!	#DIV/0!	
Year Two Estimates					
	Participants				
	Administrative Costs				
	Program Costs				
	Total Costs				
	Administrative Costs Per Participant	#DIV/0!	#DIV/0!	#DIV/0!	
	Program Costs Per Participant	#DIV/0!	#DIV/0!	#DIV/0!	
	Total Costs Per Participant	#DIV/0!	#DIV/0!	#DIV/0!	
Year Three Estimates					
	Participants				

Administrative Costs				
Program Costs				
Total Costs				
Administrative Costs Per Participant	#DIV/0!	#DIV/0!	#DIV/0!	
Program Costs Per Participant	#DIV/0!	#DIV/0!	#DIV/0!	
Total Costs Per Participant	#DIV/0!	#DIV/0!	#DIV/0!	

Total Three Year Estimated Costs

0 Participants				
Administrative Costs	$	$	$	-
Program Costs	$	$	$	-
Total Costs	$	$	$	-
Administrative Costs Per Participant	#DIV/0!	#DIV/0!	#DIV/0!	
Program Costs Per Participant	#DIV/0!	#DIV/0!	#DIV/0!	
Total Costs Per Participant	#DIV/0!	#DIV/0!	#DIV/0!	

LINE ITEM BUDGET ADMINISTRATIVE COSTS

Organization's Name
Project Title
Budget Duration (i.e. October 1, 2016 - September 30, 2017)

ADMINISTRATIVE COSTS								
		Unit Cost			**FY17 Program Total**	**FY17 Requested Federal Funds**	**FY17 Cost-Share by Applicant**	**FY17 Program Total**
		Unit	**Number**	**Amount**	**Rate**				
1 **Personnel**		months	# units	salary (monthly)	% effort				
1.1 Staff 1 Name/Title		months							0
1.2 Staff 2 Name/Title.		months							0
1.3 Staff 3 Name/Title		months							0
Subtotal Personnel							**0**	**0**	**0**
2 **Fringe Benefits**				amount	rate				
2.1 Staff 1 Name/Title			months	0.00					0
2.2 Staff 2 Name/Title			months	0.00					0
2.4 Staff 3 Name/Title			months	0.00					0
Subtotal Fringe Benefits							**0**	**0**	**0**
5 **Supplies (< $5,000 per unit)**			# units	unit cost					
5.1 (description)							0		0
Subtotal Supplies							**0**	**0**	**0**
8 **Other Direct Costs (ODC)**		unit	# units	unit cost					
8.1 (description)							0		0
8.2 (description)							0		0
Subtotal Other Direct Costs							**0**	**0**	**0**
9 **Total Direct Costs**							**#REF!**	**#REF!**	**#REF!**

10	**Total Indirect Costs (Indicate: NICRA Provisional, Final, Pre determined or 10%**	base	NICRA %				
					0	0	0
11	**Total Administrative Cost**	(must match award amount)				#REF!	#REF!	#REF!

LINE ITEM BUDGET PROGRAM COSTS

Organization's Name
Project Title
Budget Duration (i.e. October 1, 2016 - September 30, 2017)

PROGRAM COSTS		Participant Support Costs? (Y/N)	Unit Cost			FY17 Program Total	FY17 Requested Federal Funds	FY17 Cost-Share by Applicant	FY17 Program Total
			Unit Type	# units	Unit Cost				
3	**Travel**		unit (trips,	# units	cost				
3.1	**DC Briefing Travel**								
3.1.1	Lodging (specify location)						0		0
3.1.2	Meals and Incidentals (specify location)						0		0
3.1.3	Transportation (specify type and location)						0		0
	Subtotal DC Briefing Travel								
3.2	**Guest Speakers Travel**								
	Guest Speaker 1 (name)								
3.2.1a	Lodging (specify location)						0		0
3.2.2a	Meals and Incidentals (specify location)						0		0
3.2.3a	Transportation (specify type and location)						0		0
	Subtotal Guest Speaker 1								
	Guest Speaker 2 (name)								
3.2.1b	Lodging (specify location)						0		0
3.2.2b	Meals and Incidentals (specify location)						0		0
3.2.3b	Transportation (specify type and location)						0		0
	Subtotal Guest Speaker 2								
	Subtotal All Guest Speakers								

3.3	**Participant Study Tour (list each city separately)**								
	Study Tour Location 1								
3.3.1a	Lodging (specify location 1)						0		0
3.3.2a	Meals and Incidentals (specify location 1)						0		0
3.3.3a	Transportation (specify type and location 1)						0		0
	Subtotal Study Tour Location 1								
	Study Tour Location 2								
3.3.1b	Lodging (specify location 2)						0		0
3.3.2b	Meals and Incidentals (specify location 2)						0		0
3.3.3.b	Transportation (specify type and location 2)						0		0
	Subtotal Study Tour Location 2								
	Subtotal Study Tour- all locations								
3.4	**University Staff Escort Travel**								
	Staff Escort Location 1								
3.4.1a	Lodging (specify location 1)						0		0
3.4.2a	Meals and Incidentals (specify location 1)						0		0
3.4.3a	Transportation (specify type and location 1)						0		0
	Subtotal Staff Escort Location 1								
	Staff Escort Location 2								
3.4.1b	Lodging (specify location 2)						0		0
3.4.2b	Meals and Incidentals (specify location 2)						0		0
3.4.3b	Transportation (specify type and location 2)						0		0

	Subtotal Staff Escort Location 2								
	Subtotal Staff Escorts- all locations								
3.5	**Participant Interational Travel**							0	0
Subtotal Travel							**0**	**0**	**0**
4	**Equipment (> $5,000 per unit)**	Not Allowable							
5	**Supplies (< $5,000 per unit)**		# units		unit cost				
5.1	(description)						0		0
Subtotal Supplies							**0**	**0**	**0**
6	**Contractual (Consultant fees)**	unit (sub, consultant)	# units		unit cost				
6.1	Contractual Sub-Awardee (NAME)						0		0
6.2	(description, i.e. consultants)						0		0
Subtotal Contractual							**0**	**0**	**0**
7	**Construction**	Not Allowable							
8	**Other Direct Costs (ODC)**	unit	# units		unit cost				
	General Program Costs								
8.1	*Honoraria (for speakers) List separately*								
8.1.1	Speaker 1								
8.1.2	Speaker 2								
	Subtotal Honoraria								
8.2	*Educational Materials (e.g. film, video)*								
8.2.1	Material 1								
8.2.2	Material 2								
	Subtotal Educational Materials								
8.3	Web Hosting						0		0

8.4	Farewell/Welcome Event 1							0		0
8.5	Farewell/Welcome Event 2							0		0
8.6	Follow-on Activities							0		0
8.7	***Ground Transportation (specify type-bus rental, van, etc) List separately***									
8.7.1	Ground Transportation 1									
8.7.2	Ground Transportation 2									
	Subtotal Ground Transportation									
	Per Participant Program Costs									
8.8	***Academic Residency Costs***									
8.8.1	Academic Residency - lodging							0		0
8.8.2	Academic Residency - meals							0		0
8.8.3	Academic Residency- Personal Needs Allowance							0		0
	Subtotal Academic Residency									
8.9	***Required Institute Textbooks & Materials***									
8.9.1	Material 1									
8.9.2	Material 2									
	Subtotal Required Institute Textbooks & Materials									
8.10	***Communications***									
8.10.1	Cell phones									
8.10.2	Cell phone service									
	Subtotal Communications									
8.10	Books Allowance							0		0
8.11	Cultural Allowance							0		0
8.12	***Participant Admissions***									
8.12.1	Admission 1									
8.12.2	Admission 2									

	Subtotal Participant Admissions							
8.13	*Farewell Materials (certificates, etc) List separately*							
8.13.1	Farewell Material 1							
8.13.2	Farewell Material 2							
	Subtotal Farewell Materials							
8.14	Mailing						0	0
8.15	Tax Withholding						0	0
8.16	Reasonable Accomodation Contingency						0	0
	Subtotal Other Direct Costs					0	0	0
9	**Total Direct Costs**					**#REF!**	**#REF!**	**#REF!**
10	**Total Indirect Costs (Indicate: NICRA Provisional, Final, Pre determined or 10%**		base	NICRA %				
						0	0	0
11	**Total Project Cost**	(must match award amount)				**#REF!**	**#REF!**	**#REF!**