



Budgets and Budget Justifications

JORDAN WEIBEL

RESEARCH GRANTS PROGRAM LEAD





Purpose of the Budget and Budget Justification

- Grant budgets are provided for reviewers to understand in greater depth the value of the project.
- Budgets serve to demonstrate that a project's costs are appropriate and that the described work has been well planned.

Definitions

Direct Costs

- Costs which can be identified specifically with a particular grant project, and which can be directly assigned to grant activities.
- Examples: lab consumable costs, postdoc or researcher salaries, travel costs

Modified Total Direct Costs (MTDC)

- Includes all salaries and wages, fringe benefits, materials, supplies, services, travel, consultants, and subcontractors (up to the first \$25,000 of each subcontractor).

Indirect Costs

- Percentage of the MTDC that covers costs of conducting business that cannot be identified readily and specifically with specific grant projects or with a specific grant activities.
- Examples: building maintenance, support services, library operations, administrative services

Overview of the Budget and Budget Justification

- Budgets and budget justifications must be submitted using the provided scope of work and budget section of the proposal application and the associated budget tables worksheets.
- Applicants may use internal software to prepare the budget calculations; however, values must be transferred to documents provided in the application materials.
- DPR manually verifies all values listed in the budget using the numbers provided in the budget justification.



ALLIANCE GRANT PROPOSAL APPLICATION FORM

Completed proposal applications should contain all the required documents listed below. Optional documents may be included as needed to support the proposal application. **Submit the documents as follows:**

- Submit the proposal application form, letters of support, curriculum vitae or resumes, and list of active ingredients targeted for reduction, list of active ingredients proposed to be used during the course of the project (if applicable), and any optional illustrative graphics as a combined single PDF.
- Submit the full-text versions of up to five key cited documents as a combined single PDF.
- Submit the Scope of Work and Budget Information section of the proposal application Form as a Microsoft Word Document.
- Submit the Budget Tables Worksheet and any needed Subaward Budget Tables Worksheets as Microsoft Excel Worksheets.

Overview of the Budget Tables Worksheet

- A separate budget tables worksheet must be completed for the main budget, each subcontractor, and each subrecipient.
- The budget tables worksheet is available to be downloaded as an Excel document.
 - Submit completed worksheet(s) as Excel documents.
- Proposal application budget table and budget justification values must match the associated budget tables worksheet(s).

	A	B	C	D	E	F	G
1	COMPOSITE BUDGET TABLE						
2							
3	Principal Investigator Name (fill in cell A4 with the Principal Investigator's full name):						
4							
5	Principal Investigator Organization (fill in cell A6 with the Principal Investigator's organization):						
6							
7							
8	Instructions for completing the composite budget table are included on the "Instructions" sheet of this workbook.						
9							
10	BUDGET CATEGORY		Year 1	Year 2	Year 3	TOTAL	
11		From:	7/1/2024	7/1/2025	7/1/2026		
12		To:	6/30/2025	6/30/2026	6/30/2027		
13	PERSONNEL: Salary and fringe benefits.		\$0	\$0	\$0	\$0	
14	TRAVEL		\$0	\$0	\$0	\$0	
15	MATERIALS & SUPPLIES		\$0	\$0	\$0	\$0	
16	EQUIPMENT		\$0	\$0	\$0	\$0	
17	RENT		\$0	\$0	\$0	\$0	
18	SUBCONTRACTOR/SUBRECIPIENT #1 - add name here if applicabl					\$0	
19	SUBCONTRACTOR/SUBRECIPIENT #2 - add name here if applicabl					\$0	
20	SUBCONTRACTOR/SUBRECIPIENT #3 - add name here if applicabl					\$0	
21	SUBCONTRACTOR/SUBRECIPIENT #4 - add name here if applicabl					\$0	
22	SUBCONTRACTOR/SUBRECIPIENT #5 - add name here if applicabl					\$0	
23	OTHER DIRECT COSTS (ODC)	Subject to IDC Calc Y / N					
24	0	Y	\$0	\$0	\$0	\$0	
25	0	Y	\$0	\$0	\$0	\$0	

Main Budget Table

- Intended to be an overview of the costs allocated to each budget category for each year of the project.
- The amount of personnel, travel, materials and supplies, etc. for each year must be entered into the appropriate categories.
- Enter costs to the nearest whole dollar using values from the budget tables worksheet.

Principal Investigator: *Provide the name of the principal investigator here.*

Organization: *Provide the name of the principal investigator's organization here.*

COMPOSITE BUDGET FOR ENTIRE PROPOSED PROJECT PERIOD: 09/01/2024 to 06/30/2027

BUDGET CATEGORY	Year 1 9/1/2024 – 6/30/2025	Year 2 7/1/2025 – 6/30/2026	Year 3 7/1/2026 – 06/30/2027	TOTAL
PERSONNEL: <i>Salary and fringe benefits.</i>	\$0	\$0	\$0	\$0
TRAVEL	\$0	\$0	\$0	\$0
MATERIALS & SUPPLIES	\$0	\$0	\$0	\$0
EQUIPMENT	\$0	\$0	\$0	\$0
RENT	\$0	\$0	\$0	\$0
SUBCONTRACTOR #1 (IDC allowed up to 25% on first \$25,000)	\$0	\$0	\$0	\$0
SUBRECIPIENT #1 (UC/CSU applicants only, IDC not allowed)	\$0	\$0	\$0	\$0
OTHER DIRECT COST #1: Subject to IDC: Y/N	\$0	\$0	\$0	\$0
OTHE DIRECT COST #2: Subject to IDC: Y/N	\$0	\$0	\$0	\$0
TOTAL DIRECT COSTS	\$0	\$0	\$0	\$0
MODIFIED TOTAL DIRECT COSTS (F&A Base)	\$0	\$0	\$0	\$0
INDIRECT (F&A) COSTS Rate: 25%	\$0	\$0	\$0	\$0
TOTAL COSTS PER YEAR	\$0	\$0	\$0	
TOTAL COSTS FOR THE PROJECT PERIOD				\$0

* MTDC = Modified Total Direct Cost

Main Budget Table (continued)

- Totals in the worksheet will be rounded up for values ending in \$0.50 or greater, and down for values ending in \$0.49 or less.
- The total costs per year and total costs for the overall project period must add up correctly.
- All budget values must match what is calculated via the required budget tables worksheet(s).
- All values must be fully justified in the budget justification.

Principal Investigator: *Provide the name of the principal investigator here.*

Organization: *Provide the name of the principal investigator's organization here.*

COMPOSITE BUDGET FOR ENTIRE PROPOSED PROJECT PERIOD: 09/01/2024 to 06/30/2027

BUDGET CATEGORY	Year 1 9/1/2024 – 6/30/2025	Year 2 7/1/2025 – 6/30/2026	Year 3 7/1/2026 – 06/30/2027	TOTAL
PERSONNEL: <i>Salary and fringe benefits.</i>	\$0	\$0	\$0	\$0
TRAVEL	\$0	\$0	\$0	\$0
MATERIALS & SUPPLIES	\$0	\$0	\$0	\$0
EQUIPMENT	\$0	\$0	\$0	\$0
RENT	\$0	\$0	\$0	\$0
SUBCONTRACTOR #1 (IDC allowed up to 25% on first \$25,000)	\$0	\$0	\$0	\$0
SUBRECIPIENT #1 (UC/CSU applicants only, IDC not allowed)	\$0	\$0	\$0	\$0
OTHER DIRECT COST #1: Subject to IDC: Y/N	\$0	\$0	\$0	\$0
OTHE DIRECT COST #2: Subject to IDC: Y/N	\$0	\$0	\$0	\$0
TOTAL DIRECT COSTS	\$0	\$0	\$0	\$0
MODIFIED TOTAL DIRECT COSTS (F&A Base)	<i>\$0</i>	<i>\$0</i>	<i>\$0</i>	<i>\$0</i>
INDIRECT (F&A) COSTS Rate: 25%	\$0	\$0	\$0	\$0
TOTAL COSTS PER YEAR	\$0	\$0	\$0	
TOTAL COSTS FOR THE PROJECT PERIOD				\$0

* MTDC = Modified Total Direct Cost

COMPOSITE BUDGET FOR ENTIRE PROPOSED PROJECT PERIOD: 09/01/2024 to 06/30/2027

BUDGET CATEGORY	Year 1 9/1/2024 – 6/30/2025	Year 2 7/1/2025 – 6/30/2026	Year 3 7/1/2026 – 06/30/2027	TOTAL
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Main Budget Table

- Fill out the name of the principal investigator and their organization.
- Do not change the project dates, but do plan costs appropriately based on the start date:
 - **Research Grants projects begin 7/1.**
 - **Alliance Grants projects begin 9/1, making Year 1 only 10 months.**

Main Budget

Table: Personnel

- To receive grant funds as personnel, staff must be paid through the same organization as the principal investigator.
- Otherwise, they must instead be listed as subcontractors.
- Combine salaries and fringe benefits for all individuals being paid through the principal investigator's organization on the personnel line.
- Ensure that salaries and fringe benefits are calculated in Year 1 using the correct start date.
 - Research – 7/1
 - Alliance – 9/1

Principal Investigator: Provide the name of the principal investigator here.

Organization: Provide the name of the principal investigator's organization here.

COMPOSITE BUDGET FOR ENTIRE PROPOSED PROJECT PERIOD: 09/01/2024 to 06/30/2027

BUDGET CATEGORY	Year 1 9/1/2024 – 6/30/2025	Year 2 7/1/2025 – 6/30/2026	Year 3 7/1/2026 – 06/30/2027	TOTAL
PERSONNEL: <i>Salary and fringe benefits.</i>	\$0	\$0	\$0	\$0
TRAVEL	\$0	\$0	\$0	\$0
MATERIALS & SUPPLIES	\$0	\$0	\$0	\$0
EQUIPMENT	\$0	\$0	\$0	\$0
RENT	\$0	\$0	\$0	\$0
SUBCONTRACTOR #1 (IDC allowed up to 25% on first \$25,000)	\$0	\$0	\$0	\$0
SUBRECIPIENT #1 (UC/CSU applicants only, IDC not allowed)	\$0	\$0	\$0	\$0
OTHER DIRECT COST #1: Subject to IDC: Y/N	\$0	\$0	\$0	\$0
OTHE DIRECT COST #2: Subject to IDC: Y/N	\$0	\$0	\$0	\$0
TOTAL DIRECT COSTS	\$0	\$0	\$0	\$0
MODIFIED TOTAL DIRECT COSTS (F&A Base)	<i>\$0</i>	<i>\$0</i>	<i>\$0</i>	<i>\$0</i>
INDIRECT (F&A) COSTS Rate: 25%	\$0	\$0	\$0	\$0
TOTAL COSTS PER YEAR	\$0	\$0	\$0	
TOTAL COSTS FOR THE PROJECT PERIOD				\$0

Main Budget

Table: Travel

- Only travel within the state of California is allowed using grant funds.
- Any travel funded by the grant must be included in the budget table.
- Combine all travel for all individuals being paid through the principal investigator's organization on the travel line.

Principal Investigator: *Provide the name of the principal investigator here.*

Organization: *Provide the name of the principal investigator's organization here.*

COMPOSITE BUDGET FOR ENTIRE PROPOSED PROJECT PERIOD: 09/01/2024 to 06/30/2027

BUDGET CATEGORY	Year 1 9/1/2024 – 6/30/2025	Year 2 7/1/2025 – 6/30/2026	Year 3 7/1/2026 – 06/30/2027	TOTAL
PERSONNEL: <i>Salary and fringe benefits.</i>	\$0	\$0	\$0	\$0
TRAVEL	\$0	\$0	\$0	\$0
MATERIALS & SUPPLIES	\$0	\$0	\$0	\$0
EQUIPMENT	\$0	\$0	\$0	\$0
RENT	\$0	\$0	\$0	\$0
SUBCONTRACTOR #1 (IDC allowed up to 25% on first \$25,000)	\$0	\$0	\$0	\$0
SUBRECIPIENT #1 (UC/CSU applicants only, IDC not allowed)	\$0	\$0	\$0	\$0
OTHER DIRECT COST #1: Subject to IDC: Y/N	\$0	\$0	\$0	\$0
OTHE DIRECT COST #2: Subject to IDC: Y/N	\$0	\$0	\$0	\$0
TOTAL DIRECT COSTS	\$0	\$0	\$0	\$0
MODIFIED TOTAL DIRECT COSTS (F&A Base)	\$0	\$0	\$0	\$0
INDIRECT (F&A) COSTS Rate: 25%	\$0	\$0	\$0	\$0
TOTAL COSTS PER YEAR	\$0	\$0	\$0	
TOTAL COSTS FOR THE PROJECT PERIOD				\$0

Main Budget Table: Travel

- Travel and reimbursement for travel costs shall be in accordance with the appropriate policies:
 - Non-UC/CSU applicants must adhere to the CalHR travel policy found at:
<https://www.calhr.ca.gov/employees/pages/travel-reimbursements.aspx>
 - UC applicants must adhere to the University travel policy found at:
<https://www.ucop.edu/central-travel-management/resources/index.html>
 - CSU applicants must adhere to the University travel policy found at:
<http://www.calstate.policystat.com/policy/10083590/latest/>
- Federal or tribal agency applicants should reach out with any specific travel policies or questions prior to submitting a proposal application.

Main Budget Table: Materials and Supplies

- Combine all materials and supplies (e.g. laboratory consumables, tools, compost, software subscriptions, etc.) on the materials & supplies line.
- The addition of materials (if not included in the approved budget) may require a grant amendment.

Principal Investigator: *Provide the name of the principal investigator here.*

Organization: *Provide the name of the principal investigator's organization here.*

COMPOSITE BUDGET FOR ENTIRE PROPOSED PROJECT PERIOD: 09/01/2024 to 06/30/2027

BUDGET CATEGORY	Year 1 9/1/2024 – 6/30/2025	Year 2 7/1/2025 – 6/30/2026	Year 3 7/1/2026 – 06/30/2027	TOTAL
PERSONNEL: <i>Salary and fringe benefits.</i>	\$0	\$0	\$0	\$0
TRAVEL	\$0	\$0	\$0	\$0
MATERIALS & SUPPLIES	\$0	\$0	\$0	\$0
EQUIPMENT	\$0	\$0	\$0	\$0
RENT	\$0	\$0	\$0	\$0
SUBCONTRACTOR #1 (IDC allowed up to 25% on first \$25,000)	\$0	\$0	\$0	\$0
SUBRECIPIENT #1 (UC/CSU applicants only, IDC not allowed)	\$0	\$0	\$0	\$0
OTHER DIRECT COST #1: Subject to IDC: Y/N	\$0	\$0	\$0	\$0
OTHE DIRECT COST #2: Subject to IDC: Y/N	\$0	\$0	\$0	\$0
TOTAL DIRECT COSTS	\$0	\$0	\$0	\$0
MODIFIED TOTAL DIRECT COSTS (F&A Base)	\$0	\$0	\$0	\$0
INDIRECT (F&A) COSTS Rate: 25%	\$0	\$0	\$0	\$0
TOTAL COSTS PER YEAR	\$0	\$0	\$0	
TOTAL COSTS FOR THE PROJECT PERIOD				\$0

Main Budget Table: Equipment

- Equipment is defined as:
 - having a useful life of at least one year,
 - having an acquisition unit cost of at least \$5,000, and
 - having been purchased with grant funds.
- Equipment is also defined as any products, objects, machinery, apparatus, implements, or tools purchased, used, or constructed within the grant, including those products, objects, machinery, apparatus, implements, or tools from which over thirty percent (30%) of the equipment is composed of materials purchased for the grant.
- Combine all equipment costs on the equipment line.

Principal Investigator: *Provide the name of the principal investigator here.*

Organization: *Provide the name of the principal investigator's organization here.*

COMPOSITE BUDGET FOR ENTIRE PROPOSED PROJECT PERIOD: 09/01/2024 to 06/30/2027

BUDGET CATEGORY	Year 1 9/1/2024 – 6/30/2025	Year 2 7/1/2025 – 6/30/2026	Year 3 7/1/2026 – 06/30/2027	TOTAL
PERSONNEL: <i>Salary and fringe benefits.</i>	\$0	\$0	\$0	\$0
TRAVEL	\$0	\$0	\$0	\$0
MATERIALS & SUPPLIES	\$0	\$0	\$0	\$0
EQUIPMENT	\$0	\$0	\$0	\$0
RENT	\$0	\$0	\$0	\$0
SUBCONTRACTOR #1 (IDC allowed up to 25% on first \$25,000)	\$0	\$0	\$0	\$0
SUBRECIPIENT #1 (UC/CSU applicants only, IDC not allowed)	\$0	\$0	\$0	\$0
OTHER DIRECT COST #1: Subject to IDC: Y/N	\$0	\$0	\$0	\$0
OTHE DIRECT COST #2: Subject to IDC: Y/N	\$0	\$0	\$0	\$0
TOTAL DIRECT COSTS	\$0	\$0	\$0	\$0
MODIFIED TOTAL DIRECT COSTS (F&A Base)	\$0	\$0	\$0	\$0
INDIRECT (F&A) COSTS Rate: 25%	\$0	\$0	\$0	\$0
TOTAL COSTS PER YEAR	\$0	\$0	\$0	
TOTAL COSTS FOR THE PROJECT PERIOD				\$0

Main Budget Table:

Rent

- Combine all rental costs (e.g. facility rental, item rentals, etc.) on the rent line.

Principal Investigator: Provide the name of the principal investigator here.

Organization: Provide the name of the principal investigator's organization here.

COMPOSITE BUDGET FOR ENTIRE PROPOSED PROJECT PERIOD: 09/01/2024 to 06/30/2027

BUDGET CATEGORY	Year 1 9/1/2024 – 6/30/2025	Year 2 7/1/2025 – 6/30/2026	Year 3 7/1/2026 – 06/30/2027	TOTAL
PERSONNEL: <i>Salary and fringe benefits.</i>	\$0	\$0	\$0	\$0
TRAVEL	\$0	\$0	\$0	\$0
MATERIALS & SUPPLIES	\$0	\$0	\$0	\$0
EQUIPMENT	\$0	\$0	\$0	\$0
RENT	\$0	\$0	\$0	\$0
SUBCONTRACTOR #1 (IDC allowed up to 25% on first \$25,000)	\$0	\$0	\$0	\$0
SUBRECIPIENT #1 (UC/CSU applicants only, IDC not allowed)	\$0	\$0	\$0	\$0
OTHER DIRECT COST #1: Subject to IDC: Y/N	\$0	\$0	\$0	\$0
OTHE DIRECT COST #2: Subject to IDC: Y/N	\$0	\$0	\$0	\$0
TOTAL DIRECT COSTS	\$0	\$0	\$0	\$0
MODIFIED TOTAL DIRECT COSTS (F&A Base)	\$0	\$0	\$0	\$0
INDIRECT (F&A) COSTS Rate: 25%	\$0	\$0	\$0	\$0
TOTAL COSTS PER YEAR	\$0	\$0	\$0	
TOTAL COSTS FOR THE PROJECT PERIOD				\$0

Main Budget Table: Subcontractor

- A subcontractor is an independent entity that will be collaborating with or providing a service to the applicant to complete the objectives of the grant.
- Recall that if staff cannot receive funds through the principal investigator's organization, they must instead be listed as subcontractors.
- Combine all of a given subcontractor's costs into the subcontractor line (including indirect costs).

Principal Investigator: *Provide the name of the principal investigator here.*

Organization: *Provide the name of the principal investigator's organization here.*

COMPOSITE BUDGET FOR ENTIRE PROPOSED PROJECT PERIOD: 09/01/2024 to 06/30/2027

BUDGET CATEGORY	Year 1 9/1/2024 – 6/30/2025	Year 2 7/1/2025 – 6/30/2026	Year 3 7/1/2026 – 06/30/2027	TOTAL
PERSONNEL: <i>Salary and fringe benefits.</i>	\$0	\$0	\$0	\$0
TRAVEL	\$0	\$0	\$0	\$0
MATERIALS & SUPPLIES	\$0	\$0	\$0	\$0
EQUIPMENT	\$0	\$0	\$0	\$0
RENT	\$0	\$0	\$0	\$0
SUBCONTRACTOR #1 (IDC allowed up to 25% on first \$25,000)	\$0	\$0	\$0	\$0
SUBRECIPIENT #1 (UC/CSU applicants only, IDC not allowed)	\$0	\$0	\$0	\$0
OTHER DIRECT COST #1: Subject to IDC: Y/N	\$0	\$0	\$0	\$0
OTHE DIRECT COST #2: Subject to IDC: Y/N	\$0	\$0	\$0	\$0
TOTAL DIRECT COSTS	\$0	\$0	\$0	\$0
MODIFIED TOTAL DIRECT COSTS (F&A Base)	<i>\$0</i>	<i>\$0</i>	<i>\$0</i>	<i>\$0</i>
INDIRECT (F&A) COSTS Rate: 25%	\$0	\$0	\$0	\$0
TOTAL COSTS PER YEAR	\$0	\$0	\$0	
TOTAL COSTS FOR THE PROJECT PERIOD				\$0

Main Budget Table: Subcontractor

- Note that each subcontractor will need a completed budget table worksheet, budget table, and a budget justification.
- If a project includes multiple subcontractors, each subcontractor must have their own line in the budget table.

Principal Investigator: *Provide the name of the principal investigator here.*

Organization: *Provide the name of the principal investigator's organization here.*

COMPOSITE BUDGET FOR ENTIRE PROPOSED PROJECT PERIOD: 09/01/2024 to 06/30/2027

BUDGET CATEGORY	Year 1 9/1/2024 – 6/30/2025	Year 2 7/1/2025 – 6/30/2026	Year 3 7/1/2026 – 06/30/2027	TOTAL
PERSONNEL: <i>Salary and fringe benefits.</i>	\$0	\$0	\$0	\$0
TRAVEL	\$0	\$0	\$0	\$0
MATERIALS & SUPPLIES	\$0	\$0	\$0	\$0
EQUIPMENT	\$0	\$0	\$0	\$0
RENT	\$0	\$0	\$0	\$0
SUBCONTRACTOR #1 (IDC allowed up to 25% on first \$25,000)	\$0	\$0	\$0	\$0
SUBRECIPIENT #1 (UC/CSU applicants only, IDC not allowed)	\$0	\$0	\$0	\$0
OTHER DIRECT COST #1: Subject to IDC: Y/N	\$0	\$0	\$0	\$0
OTHE DIRECT COST #2: Subject to IDC: Y/N	\$0	\$0	\$0	\$0
TOTAL DIRECT COSTS	\$0	\$0	\$0	\$0
MODIFIED TOTAL DIRECT COSTS (F&A Base)	<i>\$0</i>	<i>\$0</i>	<i>\$0</i>	<i>\$0</i>
INDIRECT (F&A) COSTS Rate: 25%	\$0	\$0	\$0	\$0
TOTAL COSTS PER YEAR	\$0	\$0	\$0	
TOTAL COSTS FOR THE PROJECT PERIOD				\$0

Main Budget Table: Subrecipient

- Subrecipients are a specific classification of subcontractor that applies to UC/CSU applicants only.
- Applicants should refer to their UC or CSU institution for guidance on whether a subcontractor meets the criteria of a subrecipient.
- Unlike subcontractors, no indirect costs are allowed for subrecipients in the main budget.
- Like subcontractors, subrecipients should have their own budget line of all costs, including indirect, as well as have their own budget table worksheet, budget table and budget justification.

Principal Investigator: *Provide the name of the principal investigator here.*

Organization: *Provide the name of the principal investigator's organization here.*

COMPOSITE BUDGET FOR ENTIRE PROPOSED PROJECT PERIOD: 09/01/2024 to 06/30/2027

BUDGET CATEGORY	Year 1 9/1/2024 – 6/30/2025	Year 2 7/1/2025 – 6/30/2026	Year 3 7/1/2026 – 06/30/2027	TOTAL
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TRAVEL	\$0	\$0	\$0	\$0
MATERIALS & SUPPLIES	\$0	\$0	\$0	\$0
EQUIPMENT	\$0	\$0	\$0	\$0
RENT	\$0	\$0	\$0	\$0
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SUBRECIPIENT #1 (UC/CSU applicants only, IDC not allowed)	\$0	\$0	\$0	\$0
OTHER DIRECT COST #1: Subject to IDC: Y/N	\$0	\$0	\$0	\$0
OTHE DIRECT COST #2: Subject to IDC: Y/N	\$0	\$0	\$0	\$0
TOTAL DIRECT COSTS	\$0	\$0	\$0	\$0
MODIFIED TOTAL DIRECT COSTS (F&A Base)	<i>\$0</i>	<i>\$0</i>	<i>\$0</i>	<i>\$0</i>
INDIRECT (F&A) COSTS Rate: 25%	\$0	\$0	\$0	\$0
TOTAL COSTS PER YEAR	\$0	\$0	\$0	
TOTAL COSTS FOR THE PROJECT PERIOD				\$0

Main Budget Table: Other Direct Costs (ODC)

- Provide a cost breakdown for any other expenses (e.g. insurance, graduate student tuition, information technology costs, etc.) on its own ODC line.
- Note whether each given ODC is subject to indirect costs (Y = yes; N = no).
- Add additional lines if needed.

Principal Investigator: *Provide the name of the principal investigator here.*
Organization: *Provide the name of the principal investigator's organization here.*

COMPOSITE BUDGET FOR ENTIRE PROPOSED PROJECT PERIOD: 09/01/2024 to 06/30/2027

BUDGET CATEGORY	Year 1 9/1/2024 – 6/30/2025	Year 2 7/1/2025 – 6/30/2026	Year 3 7/1/2026 – 06/30/2027	TOTAL
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MATERIALS & SUPPLIES	\$0	\$0	\$0	\$0
EQUIPMENT	\$0	\$0	\$0	\$0
RENT	\$0	\$0	\$0	\$0
SUBCONTRACTOR #1 (IDC allowed up to 25% on first \$25,000)	\$0	\$0	\$0	\$0
SUBRECIPIENT #1 (UC/CSU applicants only, IDC not allowed)	\$0	\$0	\$0	\$0
OTHER DIRECT COST #1: Subject to IDC: Y/N	\$0	\$0	\$0	\$0
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TOTAL DIRECT COSTS	\$0	\$0	\$0	\$0
MODIFIED TOTAL DIRECT COSTS (F&A Base)	\$0	\$0	\$0	\$0
INDIRECT (F&A) COSTS Rate: 25%	\$0	\$0	\$0	\$0
TOTAL COSTS PER YEAR	\$0	\$0	\$0	
TOTAL COSTS FOR THE PROJECT PERIOD				\$0

Main Budget Table: Total Direct Costs

- The budget table worksheet will provide summed direct cost values. Enter these on the total direct cost line by year and in total.

Principal Investigator: *Provide the name of the principal investigator here.*
Organization: *Provide the name of the principal investigator's organization here.*

COMPOSITE BUDGET FOR ENTIRE PROPOSED PROJECT PERIOD: 09/01/2024 to 06/30/2027

BUDGET CATEGORY	Year 1 9/1/2024 – 6/30/2025	Year 2 7/1/2025 – 6/30/2026	Year 3 7/1/2026 – 06/30/2027	TOTAL
PERSONNEL: <i>Salary and fringe benefits.</i>	\$0	\$0	\$0	\$0
TRAVEL	\$0	\$0	\$0	\$0
MATERIALS & SUPPLIES	\$0	\$0	\$0	\$0
EQUIPMENT	\$0	\$0	\$0	\$0
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SUBRECIPIENT #1 (UC/CSU applicants only, IDC not allowed)	\$0	\$0	\$0	\$0
OTHER DIRECT COST #1: Subject to IDC: Y/N	\$0	\$0	\$0	\$0
OTHE DIRECT COST #2: Subject to IDC: Y/N	\$0	\$0	\$0	\$0
TOTAL DIRECT COSTS	\$0	\$0	\$0	\$0
MODIFIED TOTAL DIRECT COSTS (F&A Base)	\$0	\$0	\$0	\$0
INDIRECT (F&A) COSTS Rate: 25%	\$0	\$0	\$0	\$0
TOTAL COSTS PER YEAR	\$0	\$0	\$0	
TOTAL COSTS FOR THE PROJECT PERIOD				\$0

Main Budget Table: Modified Total Direct Costs (MTDC)

- The MTDC is calculated for each year by totaling all the direct costs that are allowed to have associated indirect costs, including all salaries and wages, fringe benefits, materials, supplies, travel, and subcontracts (up to the first \$25,000 of each subcontract).
- Costs associated with equipment, capital expenditures, patient care charges, tuition remission, rental cost, scholarships and fellowships, the portion of any subcontract in excess of \$25,000, and any subrecipient costs cannot be included in the MTDC calculation.
- Enter the MTDC (on a yearly basis and total).

Principal Investigator:
Organization:

COMPOSITE BUDGET FOR ENTIRE PROPOSED PROJECT PERIOD: 09/01/2024 to 06/30/2027

BUDGET CATEGORY	Year 1 9/1/2024 – 6/30/2025	Year 2 7/1/2025 – 6/30/2026	Year 3 7/1/2026 – 06/30/2027	TOTAL
PERSONNEL: <i>Salary and fringe benefits.</i>	\$0	\$0	\$0	\$0
TRAVEL	\$0	\$0	\$0	\$0
MATERIALS & SUPPLIES	\$0	\$0	\$0	\$0
EQUIPMENT	\$0	\$0	\$0	\$0
RENT	\$0	\$0	\$0	\$0
SUBCONTRACTOR #1 (IDC allowed up to 25% on first \$25,000)	\$0	\$0	\$0	\$0
SUBRECIPIENT #1 (UC/CSU applicants only, IDC not allowed)	\$0	\$0	\$0	\$0
OTHER DIRECT COST #1: Subject to IDC: Y/N	\$0	\$0	\$0	\$0
OTHE DIRECT COST #2: Subject to IDC: Y/N	\$0	\$0	\$0	\$0
TOTAL DIRECT COSTS	\$0	\$0	\$0	\$0
MODIFIED TOTAL DIRECT COSTS (F&A Base)	\$0	\$0	\$0	\$0
INDIRECT (F&A) COSTS Rate: 25%	\$0	\$0	\$0	\$0
TOTAL COSTS PER YEAR	\$0	\$0	\$0	
TOTAL COSTS FOR THE PROJECT PERIOD				\$0

Main Budget Table: Indirect Costs

- Enter the indirect (F&A – Facilities and Administrative) costs rate (as a percentage) used by your organization.
- Note that DPR allows a maximum rate of 25%.

Principal Investigator: *Provide the name of the principal investigator here.*

Organization: *Provide the name of the principal investigator's organization here.*

COMPOSITE BUDGET FOR ENTIRE PROPOSED PROJECT PERIOD: 09/01/2024 to 06/30/2027

BUDGET CATEGORY	Year 1 9/1/2024 – 6/30/2025	Year 2 7/1/2025 – 6/30/2026	Year 3 7/1/2026 – 06/30/2027	TOTAL
PERSONNEL: <i>Salary and fringe benefits.</i>	\$0	\$0	\$0	\$0
TRAVEL	\$0	\$0	\$0	\$0
MATERIALS & SUPPLIES	\$0	\$0	\$0	\$0
EQUIPMENT	\$0	\$0	\$0	\$0
RENT	\$0	\$0	\$0	\$0
SUBCONTRACTOR #1 (IDC allowed up to 25% on first \$25,000)	\$0	\$0	\$0	\$0
SUBRECIPIENT #1 (UC/CSU applicants only, IDC not allowed)	\$0	\$0	\$0	\$0
OTHER DIRECT COST #1: Subject to IDC: Y/N	\$0	\$0	\$0	\$0
OTHE DIRECT COST #2: Subject to IDC: Y/N	\$0	\$0	\$0	\$0
TOTAL DIRECT COSTS	\$0	\$0	\$0	\$0
MODIFIED TOTAL DIRECT COSTS (F&A Base)	\$0	\$0	\$0	\$0
INDIRECT (F&A) COSTS Rate: 25%	\$0	\$0	\$0	\$0
TOTAL COSTS PER YEAR	\$0	\$0	\$0	
TOTAL COSTS FOR THE PROJECT PERIOD				\$0

Main Budget Table: Indirect Costs

- Input the calculated indirect costs (on a yearly basis and total) from the budget table worksheet.
 - These values are found by multiplying the MTDC by the indirect costs rate.
- Note that DPR allows a maximum rate of 25%.

Principal Investigator: *Provide the name of the principal investigator here.*

Organization: *Provide the name of the principal investigator's organization here.*

COMPOSITE BUDGET FOR ENTIRE PROPOSED PROJECT PERIOD: 09/01/2024 to 06/30/2027

BUDGET CATEGORY	Year 1 9/1/2024 – 6/30/2025	Year 2 7/1/2025 – 6/30/2026	Year 3 7/1/2026 – 06/30/2027	TOTAL
PERSONNEL: <i>Salary and fringe benefits.</i>	\$0	\$0	\$0	\$0
TRAVEL	\$0	\$0	\$0	\$0
MATERIALS & SUPPLIES	\$0	\$0	\$0	\$0
EQUIPMENT	\$0	\$0	\$0	\$0
RENT	\$0	\$0	\$0	\$0
SUBCONTRACTOR #1 (IDC allowed up to 25% on first \$25,000)	\$0	\$0	\$0	\$0
SUBRECIPIENT #1 (UC/CSU applicants only, IDC not allowed)	\$0	\$0	\$0	\$0
OTHER DIRECT COST #1: Subject to IDC: Y/N	\$0	\$0	\$0	\$0
OTHE DIRECT COST #2: Subject to IDC: Y/N	\$0	\$0	\$0	\$0
TOTAL DIRECT COSTS	\$0	\$0	\$0	\$0
MODIFIED TOTAL DIRECT COSTS (F&A Base)	\$0	\$0	\$0	\$0
INDIRECT (F&A) COSTS Rate: 25%	\$0	\$0	\$0	\$0
TOTAL COSTS PER YEAR	\$0	\$0	\$0	
TOTAL COSTS FOR THE PROJECT PERIOD				\$0

Main Budget Table: Total Costs

- Input the total costs per year from the budget table worksheet.
- Make sure to use the total direct costs rather than the modified total direct costs at this step.
- Calculate the total costs for proposed project period by summing the total direct costs and the indirect costs over the entire project period.

Principal Investigator: *Provide the name of the principal investigator here.*

Organization: *Provide the name of the principal investigator's organization here.*

COMPOSITE BUDGET FOR ENTIRE PROPOSED PROJECT PERIOD: 09/01/2024 to 06/30/2027

BUDGET CATEGORY	Year 1 9/1/2024 – 6/30/2025	Year 2 7/1/2025 – 6/30/2026	Year 3 7/1/2026 – 06/30/2027	TOTAL
PERSONNEL: <i>Salary and fringe benefits.</i>	\$0	\$0	\$0	\$0
TRAVEL	\$0	\$0	\$0	\$0
MATERIALS & SUPPLIES	\$0	\$0	\$0	\$0
EQUIPMENT	\$0	\$0	\$0	\$0
RENT	\$0	\$0	\$0	\$0
SUBCONTRACTOR #1 (IDC allowed up to 25% on first \$25,000)	\$0	\$0	\$0	\$0
SUBRECIPIENT #1 (UC/CSU applicants only, IDC not allowed)	\$0	\$0	\$0	\$0
OTHER DIRECT COST #1: Subject to IDC: Y/N	\$0	\$0	\$0	\$0
OTHE DIRECT COST #2: Subject to IDC: Y/N	\$0	\$0	\$0	\$0
TOTAL DIRECT COSTS	\$0	\$0	\$0	\$0
MODIFIED TOTAL DIRECT COSTS (F&A Base)	\$0	\$0	\$0	\$0
INDIRECT (F&A) COSTS Rate: 25%	\$0	\$0	\$0	\$0
TOTAL COSTS PER YEAR	\$0	\$0	\$0	
TOTAL COSTS FOR THE PROJECT PERIOD				\$0

Main Budget Table Example

- Ensure the total costs per year and total costs for proposed project period add up correctly.
- Ensure costs are entered to the nearest whole dollar.
- Ensure the costs in this budget table match the budget justification and budget table worksheets.

Principal Investigator: Dr. Anne Vassiv
Organization: California Habitat Conservancy

COMPOSITE BUDGET FOR ENTIRE PROPOSED PROJECT PERIOD: 09/01/2024 to 06/30/2027

BUDGET CATEGORY	Year 1 9/1/2024 – 6/30/2025	Year 2 7/1/2025 – 6/30/2026	Year 3 7/1/2026 – 06/30/2027	TOTAL
PERSONNEL: <i>Salary and fringe benefits.</i>	\$27,083	\$47,906	\$55,125	\$130,114
TRAVEL	\$99	\$1,315	\$299	\$1,713
MATERIALS & SUPPLIES	\$2,440	\$2,500	\$120	\$5,060
EQUIPMENT	\$0	\$8,500	\$0	\$8,500
RENT	\$200	\$1,000	\$0	\$1,200
SUBCONTRACTOR #1 (IDC allowed up to 25% on first \$25,000)	\$14,739	\$19,184	\$3,868	\$37,791
SUBCONTRACTOR #2 (IDC allowed up to 25% on first \$25,000)	\$0	\$40,262	\$0	\$40,262
SUBRECIPIENT #1 (UC/CSU applicants only, IDC not allowed)	\$0	\$0	\$0	\$0
OTHER DIRECT COST #1: Subject to IDC: Y/N	\$0	\$0	\$0	\$0
OTHE DIRECT COST #2: Subject to IDC: Y/N	\$0	\$0	\$0	\$0
TOTAL DIRECT COSTS	\$44,561	\$120,667	\$59,412	\$224,640
MODIFIED TOTAL DIRECT COSTS (F&A Base)	\$44,361	\$86,982	\$55,544	\$186,887
INDIRECT (F&A) COSTS Rate: 25%	\$11,090	\$21,746	\$13,886	\$46,722
TOTAL COSTS PER YEAR	\$55,651	\$142,413	\$73,298	
TOTAL COSTS FOR THE PROJECT PERIOD				\$271,362

Main Budget Table Example

A sample scope of work and budget can be found on the proposal application materials website for each Grants Program, respectively.

Principal Investigator: Mike Rowbes

Organization: University of California

COMPOSITE BUDGET FOR ENTIRE PROPOSED PROJECT PERIOD: 07/01/2024 to 6/30/2027

BUDGET CATEGORY	Year 1 7/1/2024 – 6/30/2025	Year 2 7/1/2025 – 6/30/2026	Year 3 7/1/2026 – 06/30/2027	TOTAL
PERSONNEL: <i>Salary and fringe benefits.</i>	\$41,644	\$42,893	\$44,180	\$128,717
TRAVEL	\$0	\$3,848	\$4,106	\$7,954
MATERIALS & SUPPLIES	\$2,950	\$4,740	\$15,645	\$23,335
EQUIPMENT	\$45,500	\$0	\$0	\$45,500
RENT	\$5,000	\$0	\$0	\$5,000
SUBRECIPIENT #1 - UCANR (UC/CSU applicants only, IDC not allowed)	\$0	\$47,965	\$53,666	\$101,631
SUBCONTRACTOR #1 – USDA-ARS (IDC allowed up to 25% on first \$25,000)	\$0	\$33,955	\$35,451	\$69,406
SUBCONTRACTOR #2 – AgAeronauticals Inc. (IDC allowed up to 25% on first \$25,000)	\$0	\$10,616	\$20,631	\$31,247
OTHER DIRECT COST #1: Tuition and Fees Subject to IDC: N	\$10,233	\$10,545	\$11,087	\$31,865
OTHER DIRECT COST #2: Subject to IDC: Y/N	\$0	\$0	\$0	\$0
TOTAL DIRECT COSTS	\$105,327	\$154,562	\$184,766	\$444,655
MODIFIED TOTAL DIRECT COSTS (F&A Base)	\$49,594	\$87,097	\$78,315	\$215,006
INDIRECT (F&A) COSTS Rate: 25%	\$12,399	\$21,774	\$19,579	\$53,752
TOTAL COSTS PER YEAR	\$117,726	\$176,336	\$204,345	
TOTAL COSTS FOR THE PROJECT PERIOD				\$498,407

Budget Justification

- Intended to fully justify the amounts in the main budget table and show transparency in the proposed use of public funds.
- A budget table worksheet must be completed prior to the justification.
- Values from the budget table worksheet should be entered in the appropriate categories.
- If a category is not relevant to a project, the text can be deleted and “N/A” can be entered.

Budget Justification

The budget justification will include the following items in this format. Identify and report in-kind contributions of personnel time, equipment, facilities, and materials by team members. Complete a separate budget justification (see below) for each subrecipient (UC/CSU applicants only) or subcontractor.

For all applicable items reported in this budget justification section, the corresponding sheet in the budget tables worksheet (Microsoft Excel) must be completed in full. Numbers contained in the budget tables worksheet must match the numbers reported in this budget justification section.

PERSONNEL

Name. *Starting with the principal investigator, list the names of all known personnel who will be involved on the project for each year of the proposed project period. Include all collaborating investigators, individuals in training, technical and support staff and include as “to-be-determined” (TBD).*

Staff 1 Name
Staff 2 Name
Staff 3 Name

Role on Project. *For each personnel listed by name, including “to-be-determined” (TBD) positions, list their role on the project. Add additional lines as needed.*

Staff 1 – Description of role on project
Staff 2 – Description of role on project
Staff 3 – Description of role on project

Salary. *For all personnel, including “to-be-determined” positions, list the salary per year and the total salary. Additionally, note any in-kind salary contributions. Add additional lines as needed.*

Staff 1 – Year 1 - \$_____; Year 2 - \$_____; Year 3 - \$_____; Total: \$_____
Staff 2 – Year 1 - \$_____; Year 2 - \$_____; Year 3 - \$_____; Total: \$_____
Staff 3 – Year 1 - \$_____; Year 2 - \$_____; Year 3 - \$_____; Total: \$_____

PERSONNEL

Name. Starting with the principal investigator, list the names of all known personnel who will be involved on the project for each year of the proposed project period. Include all collaborating investigators, individuals in training, technical and support staff and include as “to-be-determined” (TBD).

Staff 1 Name

Staff 2 Name

Staff 3 Name

Role on Project. For each personnel listed by name, including “to-be-determined” (TBD) positions, list their role on the project. Add additional lines as needed.

Staff 1 – Description of role on project

Staff 2 – Description of role on project

Staff 3 – Description of role on project

Budget Justification: Personnel

Budget Justification: Personnel

Sample Budget Table Worksheet

	A	B	C	D	E	F	G
1	MAIN BUDGET - PERSONNEL						
2							
3	SALARY - SALARIED EMPLOYEES						
4	Instructions for completing this table are included on the "Instructions" sheet of this workbook.						
	Staff Name	Base Salary	Year 1 # of Months Working on Project	Year 2 # of Months Working on Project	Year 3 # of Months Working on Project	Year 1 Percent Effort (based on number of months working on project in Year 1)	Year 2 Percent Effort (based on number of months working on project in Year 2)
5							
6	Anne Vassiv	\$125,000	10.00	12.00	12.00	3.00%	3.00%
7	Erin Dao	\$75,000	10.00	12.00	12.00	25.00%	25.00%
8	Tim Ericks	\$70,000	10.00	12.00	12.00	5.00%	20.00%
9							

Budget Justification: Personnel Example

PERSONNEL

Name. Starting with the principal investigator, list the names of all known personnel who will be involved on the project for each year of the proposed project period. Include all collaborating investigators, individuals in training, technical and support staff and include as “to-be-determined” (TBD).

Dr. Anne Vassiv
Erin Dao
Tim Ericks
Al Anthi
Rob Inya
Phil Ariss
Sal Zola

Role on Project. For each personnel listed by name, including “to-be-determined” (TBD) positions, list their role on the project. Add additional lines as needed.

Anne Vassiv, Principal Investigator, from California Habitat Conservancy will oversee all aspects of project completion and serve as the supervisor for all other personnel on this project.

Erin Dao, Program Manager, from California Habitat Conservancy will coordinate between Alliance Team members and lead the development of the action plan and reports.

Tim Ericks, Training Lead, from California Habitat Conservancy will develop training materials and lead trainings and presentations.

Al Anthi and Rob Inya, Regional and State Agency Liaisons will provide in-kind services, as part of their salaried positions with their respective agencies, to attend Alliance Team meetings, provide institutional knowledge, and supervise field trainings. *No salary requested.*

Phil Ariss, volunteer organizer, from Boots On Sacramento will provide in-kind services as part of their salaried position and supervise groups of volunteers that are enrolled in the organization’s fellowship program. *No salary requested.*

Sal Zola, community organizer, from Friends of Sacramento Parks will be serving on a volunteer basis to recruit and lead members of the public during the field trainings. *No salary requested.*

	A	B	C	D	E
1	PERSONNEL				
2					
3	SALARY - SALARIED EMPLOYEES				
4	Instructions for completing this table are included on the "Instructions" sheet of this workbook.				
5	Staff Name	Base Salary	Year 1 # of Months Working on Project	Year 2 # of Months Working on Project	Year 3 # of Months Working on Project
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					
16					
17	WAGES - HOURLY EMPLOYEES				
18	Instructions for completing this table are included on the "Instructions" sheet of this workbook.				
19	Staff Name	Base Hourly Rate	Year 1 Number of Hours	Year 2 Number of Hours	Year 3 Number of Hours
20					
21					
22					
23					

Salary. For all personnel, including "to-be-determined" positions, list the salary per year and the total salary. Additionally, note any in-kind salary contributions. Add additional lines as needed.

Staff 1 – Year 1 - \$_____ ; Year 2 - \$_____ ; Year 3 - \$_____ ; Total: \$_____
Staff 2 – Year 1 - \$_____ ; Year 2 - \$_____ ; Year 3 - \$_____ ; Total: \$_____
Staff 3 – Year 1 - \$_____ ; Year 2 - \$_____ ; Year 3 - \$_____ ; Total: \$_____

Budget Justification: Personnel Salary or Wages

- Alliance Grant projects should budget for 10 months in Year 1 (start date of 9/1).
- Use salary or wages section of the budget tables worksheet to calculate costs.
- Place values in budget justification.

Budget Justification: Personnel Salary Examples

- Ensure that salaries and fringe benefits are calculated in Year 1 using the correct start date.
- **Research Grant – 7/1**
 - Year 1 is 12 months
 - aligns with top example
- **Alliance Grant – 9/1**
 - Year 1 is 10 months
 - aligns with bottom example

Research Example

Salary. For all personnel, including “to-be-determined” positions, list the salary per year and the total salary. Additionally, note any in-kind salary contributions. Add additional lines as needed.

Mike Rowbes – Year 1 - \$0; in-kind; Year 2 - \$0; in-kind; Year 3 - \$0; in-kind; Total: \$0; in-kind
Pete Reedisch – Year 1 - \$18,130; Year 2 - \$18,674; Year 3 - \$19,234; Total: \$56,038
Anne Alaciss – Year 1 - \$10,000; Year 2 - \$10,300; Year 3 - \$10,609; Total: \$30,909
Undergraduate #1 (TBD) – Year 1 - \$5,750; Year 2 - \$5,923; Year 3 - \$6,100; Total: \$17,773
Undergraduate #2 (TBD) – Year 1 - \$5,750; Year 2 - \$5,923; Year 3 - \$6,100; Total: \$17,773

Alliance Example

Salary. For all personnel, including “to-be-determined” positions, list the salary per year and the total salary. Additionally, note any in-kind salary contributions. Add additional lines as needed.

Anne Vassiv – Year 1 - \$3,125; Year 2 - \$3,938; Year 3 - \$4,134; Total: \$11,197
Erin Dao – Year 1 - \$15,625; Year 2 - \$19,688; Year 3 - \$20,672; Total: \$55,985
Tim Ericks – Year 1 - \$2,917; Year 2 - \$14,700; Year 3 - \$19,294; Total: \$36,911

	A	B	C	D
31	FRINGE BENEFITS - SALARIED EMPLOYEES			
32	Instructions for completing this table are included on the "Instructions" sheet of this workbook.			
	Staff Name	Year 1 Fringe Benefits Rate	Year 2 Fringe Benefits Rate	Year 3 Fringe Benefits Rate
33				
34	0			
35	0			
36	0			
37	0			
38	0			
39	0			
40	0			
41	0			
42	0			
43	0			
44				
45	FRINGE BENEFITS - HOURLY EMPLOYEES			
46	Instructions for completing this table are included on the "Instructions" sheet of this workbook.			
	Staff Name	Year 1 Fringe Benefits Rate	Year 2 Fringe Benefits Rate	Year 3 Fringe Benefits Rate
47				
48	0			
49	0			
50	0			
51	0			
52	0			
53	0			

Fringe Benefits. For all personnel, including "to-be-determined" positions, list the fringe benefits per year and the total fringe benefits. Add additional lines as needed.

Anne Vassiv – Year 1 - \$781; Year 2 - \$984; Year 3 - \$1,034; Total: \$2,799
 Erin Dao – Year 1 - \$3,906; Year 2 - \$4,922; Year 3 - \$5,168; Total: \$13,996
 Tim Ericks – Year 1 - \$729; Year 2 - \$3,675; Year 3 - \$4,823; Total: \$9,227

Budget Justification: Personnel Fringe Benefits

- Alliance Grant projects should budget for 10 months in Year 1 (start date of 9/1).
- Use salary or wages section of the budget table worksheet to calculate costs.
- Place values in budget justification.

Budget Justification: Personnel Fringe Benefits Example

31	FRINGE BENEFITS - SALARIED EMPLOYEES						
32	Instructions for completing this table are included on the "Instructions" sheet of this workbook.						
	Staff Name	Year 1 Fringe Benefits Rate	Year 2 Fringe Benefits Rate	Year 3 Fringe Benefits Rate	Year 1 Fringe Benefits Requested	Year 2 Fringe Benefits Requested	Year 3 Fringe Benefits Requested
33							
34	Anne Vassiv	25.00%	25.00%	25.00%	\$781.25	\$984.38	\$1,033.59
35	Erin Dao	25.00%	25.00%	25.00%	\$3,906.25	\$4,921.88	\$5,167.97
36	Tim Ericks	25.00%	25.00%	25.00%	\$729.17	\$3,675.00	\$4,823.44
37	0				\$0.00	\$0.00	\$0.00



Fringe Benefits. For all personnel, including "to-be-determined" positions, list the fringe benefits per year and the total fringe benefits. Add additional lines as needed.

Anne Vassiv – Year 1 - \$781; Year 2 - \$984; Year 3 - \$1,034; Total: \$2,799

Erin Dao – Year 1 - \$3,906; Year 2 - \$4,922; Year 3 - \$5,168; Total: \$13,996

Tim Ericks – Year 1 - \$729; Year 2 - \$3,675; Year 3 - \$4,823; Total: \$9,227

59	Total Salary	
60	Year	Total
61	Year 1	\$0.00
62	Year 2	\$0.00
63	Year 3	\$0.00
64		
65	Total Fringe Benefits	
66	Year	Total
67	Year 1	\$0.00
68	Year 2	\$0.00
69	Year 3	\$0.00
70		
71	Total Personnel Costs	
72	Year	Total
73	Year 1	\$0.00
74	Year 2	\$0.00
75	Year 3	\$0.00
76		

Total Personnel Costs.

Yearly Salary Totals

Year 1 - \$_____; Year 2 - \$_____; Year 3 - \$_____; Total: \$_____

Yearly Fringe Benefits Totals

Year 1 - \$_____; Year 2 - \$_____; Year 3 - \$_____; Total: \$_____

Yearly Personnel Totals

Year 1 - \$_____; Year 2 - \$_____; Year 3 - \$_____; Total: \$_____

Budget Justification: Total Personnel Costs

- Alliance Grant projects should budget for 10 months in Year 1 (start date of 9/1).
- Values in budget table worksheet automatically calculate.
- Place budget tables worksheet values in the total personnel costs section of the proposal.

Budget Justification: Total Personnel Costs Examples

Alliance Grant projects should budget for 10 months in Year 1 (start date of 9/1).

Example

59	Total Salary	
60	Year	Total
61	Year 1	\$21,666.67
62	Year 2	\$38,325.00
63	Year 3	\$44,100.00
64		
65	Total Fringe Benefits	
66	Year	Total
67	Year 1	\$5,416.67
68	Year 2	\$9,581.25
69	Year 3	\$11,025.00
70		
71	Total Personnel Costs	
72	Year	Total
73	Year 1	\$27,083.00
74	Year 2	\$47,906.00
75	Year 3	\$55,125.00
76		



Total Personnel Costs.

Yearly Salary Totals

Year 1 - \$21,667; Year 2 - \$38,325; Year 3 - \$44,100; Total: \$104,092

Yearly Fringe Benefits Totals

Year 1 - \$5,417; Year 2 - \$9,581; Year 3 - \$11,025; Total: \$26,023

Yearly Personnel Totals

Year 1 - \$27,083; Year 2 - \$47,906; Year 3 - \$55,125; Total: \$130,114

Budget Justification: Total Personnel Costs Examples

The yearly personnel totals and the personnel project total in the budget justification must match the yearly personnel line-item totals and personnel project totals in the main budget table and budget tables worksheet.

Total Personnel Costs.
Yearly Salary Totals
Year 1 - \$21,667; Year 2 - \$38,325; Year 3 - \$44,100; Total: \$104,092
Yearly Fringe Benefits Totals
Year 1 - \$5,417; Year 2 - \$9,581; Year 3 - \$11,025; Total: \$26,023
Yearly Personnel Totals
Year 1 - \$27,083; Year 2 - \$47,906; Year 3 - \$55,125; Total: \$130,114

Principal Investigator: Dr. Anne Vassiv				
Organization: California Habitat Conservancy				
COMPOSITE BUDGET FOR ENTIRE PROPOSED PROJECT PERIOD: 09/01/2024 to 06/30/2027				
BUDGET CATEGORY	Year 1 9/1/2024 – 6/30/2025	Year 2 7/1/2025 – 6/30/2026	Year 3 7/1/2026 – 06/30/2027	TOTAL
PERSONNEL: <i>Salary and fringe benefits.</i>	\$27,083	\$47,906	\$55,125	\$130,114

71	Total Personnel Costs	
72	Year	Total
73	Year 1	\$27,083.00
74	Year 2	\$47,906.00
75	Year 3	\$55,125.00
76		

TRAVEL (SEE TERMS AND CONDITIONS)

Itemize all travel requests separately by trip and justify, in accordance with university or organizational travel guidelines. Travel and reimbursement for travel for applicants not affiliated with the University of California (UC) or the California State University (CSU) systems shall be in accordance with the California Department of Human Resources' (CalHR) travel policy. For trips that occur over multiple years, include as separate trips. Add additional trips as needed.

TRIP #1

Trip Occurs in:

☐ Year 1☐ Year 2☐ Year 3

Origin:

Destination:

Budget Justification: Travel

Travel Budget Table Worksheet

1	TRAVEL	
2		
3	Instructions for completing these tables are included	
4	YEAR 1 TRAVEL COSTS	
5	Trip #1 - Year 1	
6	Airfare	
7	Number of passengers	
8	Total airfare per passenger	
9	Subtotal	\$0.00
10	Vehicle Rental	
11	Vehicle 1 - Daily vehicle rental rate	
12	Vehicle 1 - Number of days	
13	Vehicle 2 - Daily vehicle rental rate	
14	Vehicle 2 - Number of days	
15	Subtotal	\$0.00
16	Fuel	
17	Mileage reimbursement rate	
18	Roundtrip number of miles	
19	OR	
20	Bulk fuel purchase	
21	Subtotal	\$0.00
22	Per Diem	
23	Number of days	
24	Number of staff	
25	Per diem rate	
26	Subtotal	\$0.00

27	Lodging	
28	Number of nights	
29	Number of rooms	
30	Nightly lodging rate	
31	Subtotal	\$0.00
32	Total Cost per Trip Occurrence	\$0.00
33	Number of Occurrences	
34	Grand Total	\$0.00

Budget Justification: Travel Example

Input information from
completed budget tables
worksheet.

TRIP #1

Trip Occurs in: ☒ Year 1 ☐ Year 2 ☐ Year 3

Origin: Oakland, CA

Destination: Sutter's Fort, Sacramento, CA

Duration (number of days and number of nights): 1 day, 0 nights

Personnel Names: Anne Vassiv, Erin Dao, Tim Ericks

Purpose: In-person meeting with Alliance Team

Total Cost per Trip: \$99

Number of Trip Occurrences: 1

Trip #1 Total: \$99

Budget Justification: Total Travel Costs Examples

- The yearly travel totals and the travel project total in the budget justification must match the yearly travel line-item totals and travel project totals in the main budget table and budget tables worksheet.

Total Travel Costs.
Year 1 - \$99; Year 2 - \$1,315; Year 3 - \$299; Total: \$1,713

BUDGET CATEGORY	Year 1 9/1/2024 – 6/30/2025	Year 2 7/1/2025 – 6/30/2026	Year 3 7/1/2026 – 06/30/2027	TOTAL
PERSONNEL: <i>Salary and fringe benefits.</i>	\$27,083	\$47,906	\$55,125	\$130,114
TRAVEL	\$99	\$1,315	\$299	\$1,713

99		
100	Total Travel Costs	
101	Year	Total
102	Year 1	\$99
103	Year 2	\$1,315
104	Year 3	\$299
105	Total	\$1,713
106		
107		

MATERIALS AND SUPPLIES

Itemize all materials and supplies separately by item and include a complete justification of the project's need for these items. Theft sensitive equipment (under \$5,000) must be justified and tracked separately in accordance with State Contracting Manual Section 7.29. Add additional lines as needed.

Item 1 – Year 1 - \$ _____; Year 2 - \$ _____; Year 3 - \$ _____; Total: \$ _____
Item 2 – Year 1 - \$ _____; Year 2 - \$ _____; Year 3 - \$ _____; Total: \$ _____
Item 3 – Year 1 - \$ _____; Year 2 - \$ _____; Year 3 - \$ _____; Total: \$ _____

Materials and Supplies Justification: *Provide a complete justification of the project's need for these items.*

Total Materials and Supplies Costs.

Year 1 - \$ _____; Year 2 - \$ _____; Year 3 - \$ _____; Total: \$ _____

Budget Justification: Materials & Supplies

Budget Tables Worksheet: Materials & Supplies Example

	A	B	C	D	E	F	G	H	I	J
1	MAIN BUDGET - MATERIALS AND SUPPLIES									
2										
3	Instructions for completing this table are included on the "Instructions" sheet of this workbook.									
4	Item	Price per Unit Year 1	Price Per Unit Year 2	Price per Unit Year 3	Quantity Needed in Year 1	Quantity Needed in Year 2	Quantity Needed in Year 3	Year 1	Year 2	Year 3
5	iPad tablet	\$600.00			4			\$2,400.00	\$0.00	\$0.00
6	Field guide	\$5.00	\$5.00			240		\$0.00	\$1,200.00	\$0.00
7	Hand mattock	\$20.00	\$20.00			8		\$0.00	\$160.00	\$0.00
8	Weed wrench	\$140.00	\$140.00			2		\$0.00	\$280.00	\$0.00
9	Rogue hoe	\$30.00	\$30.00			4		\$0.00	\$120.00	\$0.00
10	Safety glasses	\$5.00	\$5.00			24		\$0.00	\$120.00	\$0.00
11	Gloves	\$5.00	\$5.00			24		\$0.00	\$120.00	\$0.00
12	Food and beverages	\$40.00	\$100.00	\$40.00	1	5	3	\$40.00	\$500.00	\$120.00
13								\$0.00	\$0.00	\$0.00

Materials and Supplies Justification: *Provide a complete justification of the project's need for these items.*

We will purchase 4 tablets in Year 1 to allow trainees to access the software necessary to identify and document plant observations in the field.

We will print our field guide in Year 2 and provide a copy to each training participant to assist with plant identification and monitoring protocols.

We will purchase hand tools (hand mattocks, weed wrenches, and rogue hoes) and personal protective equipment (PPE) in Year 2 and bring them to field trainings and outreach visits so that populations of invasive plants that are observed and verified by land managers can be mechanically removed.

We will purchase beverages and snacks for each in-person meeting and training. We estimate this amount to be \$40 per meeting and outreach visit and \$100 per training.

Budget Justification: Materials & Supplies: Example

Ensure a complete justification of the project's need for these items is included.

Budget Justification: Total Materials & Supplies Costs Example

- The yearly materials and supplies totals and the materials and supplies project total in the budget justification must match the yearly materials and supplies line-item totals and materials and supplies project totals in the main budget table and budget tables worksheet.

Total Materials and Supplies Costs.
Year 1 - \$2,440; Year 2 - \$2,500; Year 3 - \$120; Total: \$5,060

Principal Investigator: Dr. Anne Vassiv				
Organization: California Habitat Conservancy				
COMPOSITE BUDGET FOR ENTIRE PROPOSED PROJECT PERIOD: 09/01/2024 to 06/30/2027				
BUDGET CATEGORY	Year 1 9/1/2024 – 6/30/2025	Year 2 7/1/2025 – 6/30/2026	Year 3 7/1/2026 – 06/30/2027	TOTAL
PERSONNEL: <i>Salary and fringe benefits.</i>	\$27,083	\$47,906	\$55,125	\$130,114
TRAVEL	\$99	\$1,315	\$299	\$1,713
MATERIALS & SUPPLIES	\$2,440	\$2,500	\$120	\$5,060

40		
41	Total Materials and Supplies Costs	
42	Year	Total
43	Year 1	\$2,440.00
44	Year 2	\$2,500.00
45	Year 3	\$120.00
46		

EQUIPMENT

List each item of equipment (value greater than or equal to \$5,000 with a useful life of more than one year) with amount requested separately and justify each. List all equipment purchases by year. Add additional lines as needed.

Equipment 1 – Year 1 - \$____; Year 2 - \$____; Year 3 - \$____; Total: \$____

Equipment 2 – Year 1 - \$____; Year 2 - \$____; Year 3 - \$____; Total: \$____

Equipment 3 – Year 1 - \$____; Year 2 - \$____; Year 3 - \$____; Total: \$____

Equipment Justification: *Provide a complete justification of the project's need for these items.*

Total Equipment Costs.

Year 1 - \$____; Year 2 - \$____; Year 3 - \$____; Total: \$____

Budget Justification: Equipment

Budget Justification: Equipment Example

	A	B	C	D	E
1	MAIN BUDGET - EQUIPMENT				
2	Instructions for completing this table are included on the "Instructions" sheet of this workbook.				
3	Equipment	Year 1 Costs	Year 2 Costs	Year 3 Costs	Total
4	GNSS Receiver		\$8,500		\$8,500
5					\$0
6					\$0
7					\$0
8					\$0
9					\$0
10					

EQUIPMENT

List each item of equipment (value greater than or equal to \$5,000 with a useful life of more than one year) with amount requested separately and justify each. List all equipment purchases by year. Add additional lines as needed.

Eos Arrow Gold – Year 1 - \$0; Year 2 - \$8,500; Year 3 - \$0; Total: \$8,500

Equipment Justification: *Provide a complete justification of the project's need for these items.*

Due to the remote nature of the field trainings, funds are requested for a one-time purchase of a Global Navigation Satellite Systems (GNSS) receiver to allow for better location accuracy for the phones and tablets recording plant observations. The specific receiver we plan to purchase, the EOS Arrow Gold, can be connected to multiple devices at once, allowing for a single receiver to be used for an entire group.

Budget Justification: Equipment: Example

Ensure a complete justification of the project's need for these items is included.

Budget Justification: Total Equipment Costs Example

- The yearly equipment totals and the equipment project total in the budget justification must match the yearly equipment line-item totals and equipment project totals in the main budget table and budget tables worksheet.

Total Equipment Costs.

Year 1 - \$0; Year 2 - \$8,500; Year 3 - \$0; Total: \$8,500

MATERIALS & SUPPLIES	\$2,440	\$2,500	\$120	\$5,060
EQUIPMENT	\$0	\$8,500	\$0	\$8,500
RENT	\$200	\$1,000	\$0	\$1,200

10									
11	Total Equipment Costs								
12	<table><tr><th>Year</th><th>Total</th></tr><tr><td>Year 1</td><td>\$0</td></tr><tr><td>Year 2</td><td>\$8,500</td></tr><tr><td>Year 3</td><td>\$0</td></tr></table>	Year	Total	Year 1	\$0	Year 2	\$8,500	Year 3	\$0
Year	Total								
Year 1	\$0								
Year 2	\$8,500								
Year 3	\$0								
13									
14									
15									
16									

RENT

If the scope of work will be performed in a facility rented from a third party for a specific project or projects, then rent may be charged as a direct expense to the award. List all facilities rented by year. Add additional lines as needed.

Rent 1 – Year 1 - \$ _____; Year 2 - \$ _____; Year 3 - \$ _____; Total: \$ _____
Rent 2 – Year 1 - \$ _____; Year 2 - \$ _____; Year 3 - \$ _____; Total: \$ _____
Rent 3 – Year 1 - \$ _____; Year 2 - \$ _____; Year 3 - \$ _____; Total: \$ _____

Total Rent Costs.

Year 1 - \$ _____; Year 2 - \$ _____; Year 3 - \$ _____; Total: \$ _____

Budget Justification: Rent

Budget Justification: Rent Example

RENT

If the scope of work will be performed in a facility rented from a third party for a specific project or projects, then rent may be charged as a direct expense to the award. List all facilities rented by year. Add additional lines as needed.

Sutter's Fort Facility – Year 1 - \$200; Year 2 - \$0; Year 3 - \$0; Total: \$200

Prairie City Facility – Year 1 - \$0; Year 2 - \$1,000; Year 3 - \$0; Total: \$1,000

17	MAIN BUDGET - RENT				
18	Instructions for completing this table are included on the "Instructions" sheet of this workbook.				
19	Rent	Year 1 Costs	Year 2 Costs	Year 3 Costs	Total
20	Sutter's Fort	\$200			\$200
21	Prairie City		\$1,000		\$1,000
22					\$0
23					\$0
24					\$0
25					\$0
26					

Budget Justification:

Total Rent Costs Example

- The yearly rent totals and the rent project total in the budget justification must match the yearly tent line-item totals and rent project totals in the main budget table and budget tables worksheet.
- Alliance Grant projects should budget for 10 months in Year 1 (start date of 9/1).

Total Rent Costs.

Year 1 - \$200; Year 2 - \$1000; Year 3 - \$0; Total: \$1,200

EQUIPMENT	\$0	\$8,500	\$0	\$8,500
RENT	\$200	\$1,000	\$0	\$1,200
SUBCONTRACTOR #1 (IDC allowed up to 25% on first \$25,000)	\$14,739	\$19,184	\$3,868	\$37,791

27	Total Rental Costs	
28	Year	Total
29	Year 1	\$200
30	Year 2	\$1,000
31	Year 3	\$0
32		

Budget Justification: Subcontracts and Subrecipients

Recall that:

- Subcontractors are an independent entity that will be collaborating with or providing a service to the applicant to complete the objectives of the grant.
- Subrecipients are a specific classification that applies to UC/CSU applicants only.
- Each subcontractor and subrecipient will need a completed budget table, budget justification, and budget tables worksheet.

SUBCONTRACTOR

Each subcontractor must submit a separate detailed budget for every year in the project period. Add additional lines as needed. Include a complete Budget Justification for the need for any subcontractor listed in the application.

Subcontractor 1 – Year 1 - \$ _____; Year 2 - \$ _____; Year 3 - \$ _____; Total: \$ _____
Subcontractor 2 – Year 1 - \$ _____; Year 2 - \$ _____; Year 3 - \$ _____; Total: \$ _____
Subcontractor 3 – Year 1 - \$ _____; Year 2 - \$ _____; Year 3 - \$ _____; Total: \$ _____

SUBRECIPIENT (UC/CSU APPLICANTS ONLY)

Each subrecipient must submit a separate detailed budget for every year in the project period. Add additional lines as needed. Include a complete Budget Justification for the need for any subrecipient listed in the application.

Subrecipient 1 – Year 1 - \$ _____; Year 2 - \$ _____; Year 3 - \$ _____; Total: \$ _____
Subrecipient 2 – Year 1 - \$ _____; Year 2 - \$ _____; Year 3 - \$ _____; Total: \$ _____
Subrecipient 3 – Year 1 - \$ _____; Year 2 - \$ _____; Year 3 - \$ _____; Total: \$ _____

Budget Justification: Subcontractor Simplified Example

- There is a \$25,000 total maximum limit allowed for each subcontract over the term of the grant that can be factored into the MTDC of the main budget.
- For each subcontractor, the total costs per year (combined direct and indirect costs) should be entered on the respective line in the main budget table.

	Year 1	Year 2	Year 3	Total
Subcontractor Total Direct Costs	\$15,000	\$12,000	\$7,500	\$34,500
Direct Costs That Can be Factored into the Main Budget MTDC	\$15,000	\$10,000	\$0	\$25,000
Direct Costs That Cannot be Factored into the Main Budget MTDC	\$0	\$2,000	\$7,500	\$9,500

Budget Justification: Total Subcontractor Costs Example

- The yearly subcontractor or subrecipient totals and respective project total in the budget justification must match the yearly line-item totals and project totals in the main budget table and the worksheet.
- Alliance Grant projects should budget for 10 months in Year 1 (start date of 9/1).

EQUIPMENT	\$0	\$8,500	\$0	\$8,500
RENT	\$200	\$1,000	\$0	\$1,200
SUBCONTRACTOR #1 (IDC allowed up to 25% on first \$25,000)	\$14,739	\$19,184	\$3,868	\$37,791
SUBCONTRACTOR #2 (IDC allowed up to 25% on first \$25,000)	\$0	\$40,262	\$0	\$40,262
SUBRECIPIENT #3	\$0	\$0	\$0	\$0

SUBCONTRACTOR

Each subcontractor must submit a separate detailed budget for every year in the project period. Add additional lines as needed. Include a complete budget justification for the need for any subcontractor listed in the application.

CalPhyta – Year 1 - \$14,739; Year 2 - \$19,184; Year 3 - \$3,868; Total: \$37,791

Workforce Development Program – Year 1 - \$0; Year 2 - \$40,262; Year 3 - \$0; Total: \$40,262

10	BUDGET CATEGORY	Year 1	Year 2	Year 3	TOTAL
11	From:	7/1/2024	7/1/2025	7/1/2026	
12	To:	6/30/2025	6/30/2026	6/30/2027	
13	PERSONNEL: Salary and fringe benefits.	\$27,083	\$47,906	\$55,125	\$130,114
14	TRAVEL	\$99	\$1,315	\$299	\$1,713
15	MATERIALS & SUPPLIES	\$2,440	\$2,500	\$120	\$5,060
16	EQUIPMENT	\$0	\$8,500	\$0	\$8,500
17	RENT	\$200	\$1,000	\$0	\$1,200
18	SUBCONTRACTOR/SUBRECIPIENT #1 - CalPhyta N/A	\$14,739	\$19,184	\$3,868	\$37,791
19	SUBCONTRACTOR/SUBRECIPIENT #2 - Workforce Development		\$40,262		\$40,262

31	Indirect (F&A) Costs				
32		F&A Base			
33	RSCH-On	MTDC	\$11,791	\$15,347	\$3,094
34	Indirect (F&A) Costs	25%	\$2,948	\$3,837	\$774
35	TOTAL ESTIMATED COSTS PER YEAR		\$14,739	\$19,184	\$3,868
36	TOTAL ESTIMATED COSTS FOR PROPOSED PROJECT PERIOD				\$37,791
37					

Subcontractor/Subrecipient Budgets
(when applicable; submit separate budget and budget justification for each)

Subcontractor/Subrecipient: Provide the name of the subcontractor/subrecipient here.

Principal Investigator: Provide the name of the principal investigator here.

Organization: Provide the name of the principal investigator's organization here.

SUBCONTRACTOR/SUBRECIPIENT BUDGET FOR ENTIRE PROPOSED PROJECT PERIOD: 09/01/2024 to 06/30/2027

BUDGET CATEGORY	Year 1 9/1/2024 – 6/30/2025	Year 2 7/1/2025 – 6/30/2026	Year 3 7/1/2026 – 06/30/2027	TOTAL
PERSONNEL: Salary and fringe benefits.	\$0	\$0	\$0	\$0
TRAVEL	\$0	\$0	\$0	\$0
MATERIALS & SUPPLIES	\$0	\$0	\$0	\$0
EQUIPMENT	\$0	\$0	\$0	\$0
RENT	\$0	\$0	\$0	\$0
SUBCONTRACTOR #1 (IDC allowed up to 25% on first \$25,000)	\$0	\$0	\$0	\$0
SUBRECIPIENT #1 (UC/CSU applicants only, IDC not allowed)	\$0	\$0	\$0	\$0
OTHER DIRECT COST #1: Subject to IDC: Y/N	\$0	\$0	\$0	\$0
OTHE DIRECT COST #2: Subject to IDC: Y/N	\$0	\$0	\$0	\$0
TOTAL DIRECT COSTS	\$0	\$0	\$0	\$0
MODIFIED TOTAL DIRECT COSTS (F&A Base)	\$0	\$0	\$0	\$0
INDIRECT (F&A) COSTS Rate: 25%	\$0	\$0	\$0	\$0
TOTAL COSTS PER YEAR	\$0	\$0	\$0	
TOTAL COSTS FOR THE PROJECT PERIOD				\$0

Subcontractor/Subrecipient Budget Justification (when applicable)

The budget justification will include the following items in this format. Identify and report in-kind contributions of personnel time, equipment, facilities, and materials by team members. Complete a separate budget justification (see below) for each subrecipient (UC/CSU applicants only) or subcontractor.

For all applicable items reported in this budget justification section, the corresponding sheet in the subaward budget tables worksheet (Microsoft Excel) must be completed in full. Numbers contained in the subaward budget tables worksheet must match the numbers reported in this budget justification section.

PERSONNEL

Name. Starting with the principal investigator, list the names of all known personnel who will be involved on the project for each year of the proposed project period. Include all collaborating investigators, individuals in training, technical and support staff and include as “to-be-determined” (TBD).

Staff 1 Name

Staff 2 Name

Staff 3 Name

Role on Project. For each personnel listed by name, including “to-be-determined” (TBD) positions, list their role on the project. Add additional lines as needed.

Staff 1 – Description of role on project

Staff 2 – Description of role on project

Staff 3 – Description of role on project

Salary. For all personnel, including “to-be-determined” positions, list the salary per year and the total salary. Additionally, note any in-kind salary contributions. Add additional lines as needed.

Staff 1 – Year 1 - \$____; Year 2 - \$____; Year 3 - \$____; Total: \$____

Staff 2 – Year 1 - \$____; Year 2 - \$____; Year 3 - \$____; Total: \$____

Staff 3 – Year 1 - \$____; Year 2 - \$____; Year 3 - \$____; Total: \$____

COMPOSITE BUDGET TABLE					
Principal Investigator Name (fill in cell A4 with the Principal Investigator's full name):					
Principal Investigator Organization (fill in cell A6 with the Principal Investigator's organization):					
Instructions for completing the composite budget table are included on the "Instructions" sheet of this workbook.					
BUDGET CATEGORY	From: To:	Year 1 7/1/2024 6/30/2025	Year 2 7/1/2025 6/30/2026	Year 3 7/1/2026 6/30/2027	TOTAL
PERSONNEL: Salary and fringe benefits.		\$0	\$0	\$0	\$0
TRAVEL		\$0	\$0	\$0	\$0
MATERIALS & SUPPLIES		\$0	\$0	\$0	\$0
EQUIPMENT		\$0	\$0	\$0	\$0
RENT		\$0	\$0	\$0	\$0
SUBCONTRACTOR/SUBRECIPIENT #1 - add name here if applicabl					\$0
SUBCONTRACTOR/SUBRECIPIENT #2 - add name here if applicabl					\$0
SUBCONTRACTOR/SUBRECIPIENT #3 - add name here if applicabl					\$0
SUBCONTRACTOR/SUBRECIPIENT #4 - add name here if applicabl					\$0
SUBCONTRACTOR/SUBRECIPIENT #5 - add name here if applicabl					\$0
OTHER DIRECT COSTS (ODC)	Subject to IDC Calc Y / N				
0	Y	\$0	\$0	\$0	\$0

Subcontractor and Subrecipient Budgets and Budget Justifications

Each subcontractor and subrecipient will need a completed budget table, budget justification, and budget table worksheet.

OTHER DIRECT COSTS (ODC)

Itemize any other expenses by category and include a complete justification of the project's need for these expenses. Specifically include and justify costs that may typically be treated as indirect costs. For example, if insurance, telecommunication, or IT costs are charged as a direct expense, explain reason and methodology. Add additional lines as needed.

ODC 1 – Year 1 - \$____; Year 2 - \$____; Year 3 - \$____; Total: \$____

Subject to Indirect Costs (IDC): ☐ Yes ☐ No

ODC 2 – Year 1 - \$____; Year 2 - \$____; Year 3 - \$____; Total: \$____

Subject to Indirect Costs (IDC): ☐ Yes ☐ No

ODC 3 – Year 1 - \$____; Year 2 - \$____; Year 3 - \$____; Total: \$____

Subject to Indirect Costs (IDC): ☐ Yes ☐ No

Budget Justification: Other Direct Costs

Budget Justification:
Other Direct Costs
(ODC) Example

OTHER DIRECT COSTS (ODC)
Itemize any other expenses by category and include a complete justification of the project's need for these expenses. Specifically include and justify costs that may typically be treated as indirect costs. For example, if insurance, telecommunication, or IT costs are charged as a direct expense, explain reason and methodology. Add additional lines as needed.

Tuition and Fees – Year 1 - \$10,233; Year 2 - \$10,545; Year 3 - \$11,087; Total: \$31,865
Subject to Indirect Costs (IDC): ☐ Yes ☒ No

32

33

34

35

36

37

38

39

40

41

42

MAIN BUDGET - OTHER DIRECT COSTS					
Instructions for completing this table are included on the "Instructions" sheet of this workbook.					
ODC	Year 1 Costs	Year 2 Costs	Year 3 Costs	Total	
Tuition and Fees	\$10,233	\$10,545	\$11,087	\$31,865	
				\$0	
				\$0	
				\$0	
				\$0	
				\$0	

Budget Justification: Total Other Direct Costs (ODC) Example

- The yearly ODC totals and the ODC project total in the budget justification must match the yearly ODC line-item totals and ODC project totals in the main budget table.
- Alliance Grant projects should budget for 10 months in Year 1 (start date of 9/1).

Total Other Direct Costs (ODC) Costs.

Year 1 - \$10,233; Year 2 - \$10,545; Year 3 - \$11,087; Total: \$31,865

(IDC allowed up to 25% on first \$25,000)					
OTHER DIRECT COST #1: Tuition and Fees Subject to IDC: N	\$10,233	\$10,545	\$11,087	\$31,865	
OTHER DIRECT COST #2:	\$0	\$0	\$0	\$0	

43	Total Other Direct Costs	
44	Year	Total
45	Year 1	\$10,233
46	Year 2	\$10,545
47	Year 3	\$11,087
48		
49		

MATERIALS AND SUPPLIES

Itemize all materials and supplies separately by item and include a complete justification of the project's need for these items. Theft sensitive equipment (under \$5,000) must be justified and tracked separately in accordance with State Contracting Manual Section 7.29. Add additional lines as needed.

N/A

Materials and Supplies Justification: *Provide a complete justification of the project's need for these items.*

N/A

Total Materials and Supplies Costs.

Year 1 - \$0; Year 2 - \$0; Year 3 - \$0; Total: \$0

EQUIPMENT

List each item of equipment (value greater than or equal to \$5,000 with a useful life of more than one year) with amount requested separately and justify each. List all equipment purchases by year. Add additional lines as needed.

N/A

Equipment Justification: *Provide a complete justification of the project's need for these items.*

N/A

Total Equipment Costs.

Year 1 - \$0; Year 2 - \$0; Year 3 - \$0; Total: \$0

Budget Justification: Unneeded Categories

If a category is not relevant to your project, the budget tables worksheet for that section can be left blank. In the budget justification, enter "N/A".

MODIFIED TOTAL DIRECT COSTS (MTDC) AND INDIRECT (F&A) COSTS (SEE TERMS AND CONDITIONS)

*Indirect costs are calculated on the modified total direct costs (MTDC) in accordance with the budgeted indirect cost rate (Limit 25% maximum). The MTDC includes **up to the first \$25,000 of each subcontract**; the portion of each subcontract in excess of \$25,000 is not included in the MTDC.*

Indirect Cost Rate (%):

Modified Total Direct Costs (MTDC) –Year 1 - \$_____; Year 2 - \$_____; Year 3 - \$_____; Total: \$_____

Total Indirect Costs.

Year 1 - \$_____; Year 2 - \$_____; Year 3 - \$_____; Total: \$_____

Budget Justification: Indirect Costs

Budget Justification: Total Indirect Costs Example

- The total indirect costs in the budget justification must match the indirect line-item total in the main budget table and budget tables worksheet.
- Alliance Grant projects should budget for 10 months in Year 1 (start date of 9/1).
- Enter the indirect (F&A – Facilities and Administrative) costs rate (as a percentage) used by your organization. Note that DPR allows a maximum rate of 25%.
- Ensure your modified total direct costs (MTDC) are correct before calculating indirect costs.

MODIFIED TOTAL DIRECT COSTS (MTDC) AND INDIRECT (F&A) COSTS (SEE TERMS AND CONDITIONS)

Indirect costs are calculated on the modified total direct costs (MTDC) in accordance with the budgeted indirect cost rate (Limit 25% maximum). The MTDC includes **up to the first \$25,000 of each subcontract**; the portion of each subcontract in excess of \$25,000 is not included in the MTDC.

Indirect Cost Rate (%): **25**

Modified Total Direct Costs (MTDC) – Year 1 - \$11,791; Year 2 - \$15,347; Year 3 - \$3,094; Total: \$30,232

Total Indirect Costs.

Year 1 - \$2,948; Year 2 - \$3,837; Year 3 - \$774; Total: \$7,558

TOTAL DIRECT COSTS	\$11,791	\$15,347	\$3,094	\$30,232
MODIFIED TOTAL DIRECT COSTS (F&A Base)	\$11,791	\$15,347	\$3,094	\$30,232
INDIRECT (F&A) COSTS Rate: 25%	\$2,948	\$3,837	\$774	\$7,558

30	TOTAL DIRECT COSTS		\$11,791	\$15,347	\$3,094	\$30,232
31	Indirect (F&A) Costs					
32		F&A Base				
33	RSCH-On	MTDC	\$11,791	\$15,347	\$3,094	\$30,232
34	Indirect (F&A) Costs	25%	\$2,948	\$3,837	\$774	\$7,558
35	TOTAL ESTIMATED COSTS PER YEAR		\$14,739	\$19,184	\$3,868	
36	TOTAL ESTIMATED COSTS FOR PROPOSED PROJECT PERIOD					\$37,791
37						



Resources and Questions

- For more information on DPR's Grants Program and to access application materials, please visit <https://www.cdpr.ca.gov/dprgrants.htm>.
- For additional questions, please email IPMGrants@cdpr.ca.gov.