

Rice University Calculating Budget Template

General Instructions

This Excel Workbook will print completed NSF budget forms. It consists of 7 worksheets, including the “General&Subcontracts,” “Year 1” through “Year 5” and “All Years.” The first page (“General&Subcontracts”) prints in landscape mode. All other pages print in portrait mode. The “years” consist of two pages – budget calculations on the left and the budget form on the right. If you only want to print the form pages, print page 2 for each year. Page 1 of “All Years” is hidden (it contains no data) and should not be printed. If your printer does not print everything on one page, set the scaling on “page setup” to something less than 100% and check the page layout in “print preview.” Move from one worksheet to another by clicking on the tabs at the bottom of the screen. If the name of the worksheet you want does not appear on the tabs, click one of the arrows to the left of the tabs. This will shift the tabs to the right or left. (The two outside arrows will move the tabs all the way to the right or left.)

All worksheets are protected. If you need to change sections of any worksheet, click on “tools,” “protection,” and “unprotect.” **Be sure to protect the worksheet after you have made your changes.**

General&Subcontract Worksheet

This worksheet contains the table for fringe benefits, tuition remission and the F&A rates for each year. You can change any individual rate or year, if needed. “Unprotect” the worksheet first. Be sure to “protect” the worksheet again after you have made your changes.

Insert the month and day of the proposed start date of the project. The workbook uses this information to calculate costs and rates by fiscal year [indicated by “A” (the first fiscal year in the budget year) and “B” (the second fiscal year in the budget year) on the worksheets]. This breakdown is used to **prorate fringe benefits rates and the F&A rate** in the event they vary from one fiscal year to another.

If there will be **subcontracts** included in your budget, **list each subcontractor** (up to 10) and **the total amount to be awarded to each per year**. The workbook will calculate the appropriate F&A to be charged (for the Rice budget) on each subcontract per year and enter this amount, as well as the subcontract amount, in the spreadsheet for each budget year. Subcontract and F&A amounts are calculated by year at the bottom of the page.

Year 1 through Year 5 Worksheet Calculations

There are 6 columns (A through F) for calculations. If the **off-campus F&A rate** will be used, put “100” in the green shaded boxes in Column A (***see rules for use of off-campus F&A at the end of this paragraph**) and enter the requested budget amount in Column F, **except for senior personnel and travel expenses**. Columns B and C will be calculated automatically. **Manually enter the expenses for senior personnel and travel** in the green shaded cells in Columns B and C **when the off-campus rate will be used**. Columns D and E are for the **on-**

campus portion of the expense category (these are calculated automatically for some categories). **Column F is the total amount of each expense category** for the grant year and should agree with the amounts under “Funds Requested by Proposer” on the budget form. ***The off-campus rate should only** be used when at least 50 percent of the expenses will be incurred at an off-campus facility. When this is the case, then the entire project will be considered “off-campus” and the off-campus rate will apply to all expenses for the project.

At the bottom of the left-hand side of the worksheet, you will see the budget-year totals for Modified Total Direct Costs (MTDC) and Graduate Student Tuition Remission (GSTR), as well as a grand total. MTDC represents the “base” referred to on the budget form, Section I. In the shaded cell in Column K, enter the F&A rate used and the MTDC (“base”) amount. (MTDC is calculated as follows: total direct costs (TDC) less graduate tuition remission, equipment costing \$5,000 or more, appropriate participant costs, and the amount of each subcontract over \$25,000.)

Note: **do not change the formulas** in any of the cells for “total” amounts (senior personnel, fringe benefits, total salaries, permanent equipment, participant costs, other direct costs, direct costs, and F&A), or the “amount for this request.”

Year 1 through All Years – Worksheet Form

Most of the information to be entered directly on the budget form will be entered in cells in Column K for Year 1 only. For the numbers inside parentheses, F&A information, and funded person-months, the spreadsheet will fill these in for Years 2 through 5. Information for successive years can be overwritten. Be sure to unprotect the spreadsheet first.

Enter the name for the Principal Investigator/Project Director in the shaded cell in Column K. Enter the other senior personnel, as appropriate. Enter the “NSF Funded Person-months” in the shaded boxes. For faculty members, only academic and summer months may be used. For faculty fellows, research scientists, and other senior personnel staff, the calendar months field should be used. Enter the description of permanent equipment for each budget year for which equipment is requested. Make sure the amount for each piece of equipment is in the same row of the spreadsheet (to the left of the form) as the description. If participant support costs are included in your budget, enter the number of participants for each year in the shaded cell inside the parentheses.

Enter any **cost share** amount in the shaded cell in Section M of the budget form.