

Washington Sea Grant Budget Worksheet Instructions

The *Budget Years* tab is informational only. It shows the budget years for which funding is available through this RFP.

Step 1: Enter sub-award organization information.

Use the *Sub-awards* tab to enter the organization names for any sub-awardees included in your budget. If your budget does not include any sub-awards, do not take any action on this tab.

Step 2: Complete budget worksheets for each year of funding requested.

Use the *Budget Worksheets* tab to add a budget worksheet. When you click the "Add Budget Worksheet" button, it will open a new tab.

- Enter a Worksheet Title (e.g., Year 1).
- Select Budget Type (UW On-Campus, UW Off-Campus, Other).
- Select Duration.
- Check the "Subaward" box ONLY for worksheets that contain subaward detail only. (Note - detailed subaward budget worksheets are not required at the pre-proposal stage.)
- Click Save and Continue.

NOTE: You should *only* use the "On-Campus" or "Off-Campus" budget types if you are a University of Washington investigator. If you are a non-UW investigator, please use the "Other" budget type (and **adjust IDC rates at the bottom of each budget worksheet as described below**).

Once you edit and save a worksheet, it will get added to your *Budget Worksheet* tab (if it does not appear, refresh the page). To edit a saved budget worksheet, click the "Edit" button next to its listing in the *Budget Worksheets* tab. You can also share your budget worksheet with your fiscal office from this page.

TIP: Budget worksheets include auto-calculation of sub-total and total values, but are not automatically saved as new data are entered. We recommend you save frequently. For all budget sections you must click the "Add" or "Save" button at the end of each budget line to save before you move on to the next line. Data will be lost if you press "Update Worksheet" before selecting "Add" or "Save."

A. SALARIES AND WAGES

For all personnel, enter the following:

- Monthly salary at full-time rate, regardless of position's actual FTE (e.g., a half-time (0.5 FTE) graduate student research assistant receiving \$1700 per month would be entered with full-time rate of \$3400 per month).
- Fringe benefits rate, as a decimal (e.g., 25.8% = 0.258). Fringe benefits are those customarily paid by the grantee institution, following its usual practices in

the payment of such benefits. Use your institution's recommended rates. The University of Washington's current rates are available [online](#).

- Sea Grant months effort as the number of full-time (1.0 FTE) months of Sea Grant support requested (e.g., for a half-time (0.5 FTE) employee working for 4 months, enter 2 total months).
- Grantee months effort as the number of full-time months of grantee (matching) support pledged (e.g., for a half-time (0.5 FTE) employee working for 4 months, enter 2 total months).

For each personnel record you add, click "Add" to save data. Data will be lost if you press "Update Worksheet" before pressing "Add."

Create new rows for additional personnel.

Senior Personnel: Senior personnel are investigators that were added on the "Principal Investigator" and "Co-Principal Investigators" pages. Select investigators from the drop-down menu.

Other Personnel: Select the category of personnel from the drop down menu. Enter their name or "TBD."

If you are requesting a Sea Grant Research Fellow DO NOT enter them in your main budget worksheet. The Fellow costs should be entered on a separate budget worksheet as described below.

NOTE: Although salaries of Federal employees cannot be used as cost share, their contributions can be documented by adding them to the budget worksheet by completing the "grantee mos. effort" field and setting the monthly salary and benefits fields to "0."

NOTE: Only personnel from the PI home institution and others included as leveraged only (i.e., \$0 salary) should be included in the Salaries and Wages section. All other personnel receiving SG funds for salary or providing salary as match should be included in a sub-award budget under Other Costs.

B. FRINGE BENEFITS

Fringe benefits are auto-calculated given the rates entered in the personnel rows.

C. PERMANENT EQUIPMENT

List any item(s) of equipment with a useful life of more than one year AND per-unit acquisition cost of \$5,000 or more. Fabricated items that have a total asset value of \$5,000 or more may be included.

D. EXPENDABLE SUPPLIES AND EQUIPMENT

Provide the total cost for office, laboratory, and field supplies and other expendable items. Also include equipment with a unit value of less than \$5,000.

E. TRAVEL

Domestic – Provide total cost of all domestic travel.

International – If international travel is planned, add a separate line for each trip and identify the destination.

F. PUBLICATIONS AND DOCUMENTATION COSTS

Provide an estimate of scientific and outreach publication costs.

G. OTHER COSTS

Select the type of other cost from the drop-down menu.

1. Sub-awards

In the MAIN budget worksheet:

- Select “Subaward” from the drop down menu. Do not use the “Sub-award NOT subject to indirect” option.
- Select the name of the sub-award organization from the drop down menu. If you do not see the name of the organization you are looking for, go back and make sure you have entered them on the *Sub-awards* tab (Step 1).
- Enter the Sea Grant funds and grantee share totals and click the “Add” button.
- The correct calculated values for a sub-award will appear after completing the sub-award information or updating the worksheet.

NOTE: Sub-awards cannot be made to Federal agencies.

NOTE: Detailed subaward budget worksheets are NOT required at the pre-proposal stage.

2. Other cost subject or not subject to IDC

- Enter the Sea Grant funds and grantee share totals and click the "Add" button.

Refer to institutional guidelines to determine indirect cost requirements.

NOTE: Tuition associated with Sea Grant Research Fellow should be entered on a separate budget worksheet as described below.

H. INDIRECT COSTS

- Indirect cost is the institution's negotiated facilities and administrative cost rate.
- The UW on- and UW off-campus budget types automatically assign indirect cost rates for the University of Washington.
- Indirect costs will only be applied to the first \$25,000 of the total budget for any subawards (inclusive of all years).

- Investigators from other institutions who selected "Other" as the "Budget Type" must enter their institutional indirect cost rate manually in section H. When "Other" is selected, the indirect rates will default to 0.555 for each category and need to be adjusted as appropriate in the "SG rates" and "Inst. rates" boxes. In almost all instances, the "Inst. rates" will be the same as the "SG rates." Consult with your institution before using "Waived IDC as Match."
- Use the checkboxes to apply indirect costs to budget sections A-G as appropriate for your institution.
- If your institution's agreement assigns indirect costs in a manner that is not supported by the budget worksheet (e.g., indirect on permanent equipment (section C)), please contact wsgres@uw.edu for guidance.
- Total direct costs subject to indirect charges are auto-calculated in Section H under "Sea Grant" and "Grantee."

Budget justifications are not required at the pre-proposal stage.

Sea Grant Research Fellows

Costs for Sea Grant Research Fellows should be entered on a separate budget worksheet for each year. You may request up to eight quarters of a graduate student stipend over a two-year project. The stipend cannot be used to cover graduate student tuition and fees. If included in your budget, tuition and fees should be entered separately from the stipend.

NOTE: All Sea Grant Research Fellows costs are included in the \$140,000/year budget cap, and must be matched at 50% (matching funds for the total award amount should be included in the non-fellow budget worksheets).

To include a Sea Grant Research Fellow in your budget:

Create a new budget worksheet on the *Budget Worksheets* tab.

- Enter a Worksheet Title (e.g., Year 1- research fellow).
- Select Budget Type (UW On-Campus, UW Off-Campus, Other).
- Use the same Budget Type as for your main budget worksheets, but **change IDC rates at the bottom to 0%**.
- Select Duration.
- Click Save and Continue.

The stipend for a Sea Grant Research Fellow can either be entered as Salary and Wages in section A or as a stipend in section G using "Other cost NOT subject to indirect." Regardless of where the stipend is entered, it should be set at the amount paid to a 50 percent-time graduate student at the host university's approved rate, but may not exceed \$49,750 per year inclusive of benefits.

Tuition, if requested, should be entered separately in section G as "Tuition cost NOT subject to indirect." Enter total tuition costs (including fees) for all quarters of support during the budget year (Feb. 1–Jan. 31).

In section H. Indirect Costs, set the IDC rates to 0%.

Budget justifications are not required at the pre-proposal stage.

When all your budget worksheets are complete, check the "Mark as complete" box under the Budget heading.