

GW CFAR Budget Template Instructions

Please complete the budget template using the following instructions. If you have questions regarding the budget template please contact Stephanie Panichello at 202-994-7639 or shp1@gwu.edu

The directions are in sequential order. As you complete each step the formulas will use the information you entered to complete the calculations.

GW CFAR Budget Template - Sheet 1

Please note - on the spreadsheet **blue text** indicates areas where values / text can be entered.

Step 1 - Project Information

- Enter Name of Principal Investigator
- Enter Title of Project
- Enter Project Start Date
- Enter Project End Date

- Example

P.I:	xxx		
PROJECT:	xxx		
SPONSOR:	GW HIV/AIDS Institute Collaborative Faculty Awards for Research		
PROJECT DATES:	1/0/00	-	1/0/00

Example – Enter in values related to project

P.I:	Jane Doe, PhD		
PROJECT:	HIV/AIDS in Washington, DC		
SPONSOR:	GW HIV/AIDS Institute Collaborative Faculty Awards for Research		
PROJECT DATES:	06/01/2008	-	05/31/2009

GW CFAR Budget Template - Sheet 1

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Step 2 - Personnel Costs

- Enter each person’s name under appropriate Institute name
- Enter each person’s title
- Enter each person’s percent effort
- Enter each person’s base salary
- Example

PERSONNEL	TITLE	% EFFORT	BASE SALARY
Institution Name			
Jane Doe	PI	20%	\$100,000
Name - Faculty	Title	0%	\$0
Name - Faculty	Title	0%	\$0
Name - Research Staff	Title	0%	\$0

Step 3 - Other Costs

- Enter cost description and total cost under appropriate Institute name
- Example

OTHER COSTS	OTHER COSTS
Institution Name	
Materials and Supplies	\$1,000
Other Expense Description	\$0
Other Expense Description	\$0

GW CFAR Budget Template - Sheet 1

Please note - on the spreadsheet **red text** indicates areas where values can be deleted.

Step 4 - Direct Cost and Cost Sharing Columns

- Remember - The directions are in sequential order. Once you enter the **Personnel** and **Other Costs** expenses the **DIRECT COST** and **COST SHARING** sections will be populated automatically
- The **Personnel** and **Other Costs** expenses that are being requested to be covered by the Institute are Direct Costs
 - If you are not cost sharing (the expense is a direct cost) – Delete the expense from the **COST SHARING** section
 - If you are not cost sharing (the expense is a direct cost) – Leave the expense in the **DIRECT COST** section
- Example
 - The expense is not being cost shared (the expense is a direct cost)
 - The contents of the cell that is highlighted in blue are deleted (**COST SHARING** – Institution 1 Total)
 - **COST SHARING TOTAL** automatically goes to zero (highlighted in yellow)
 - **GRAND PROJECT TOTAL** is automatically reduced (highlighted in yellow)

Example - Before Deleting Cost Sharing expense

		DIRECT COST					COST SHARING						
			Institution	Institution	Institution	DIRECT		Institution	Institution	Institution	COST	GRAND	
PROJECT	FRINGE	GWU	2	3	4	COST	GWU	2	3	4	SHARING	PROJECT	
SALARY	BENEFITS	TOTAL	TOTAL	TOTAL	TOTAL	TOTAL	TOTAL	TOTAL	TOTAL	TOTAL	TOTAL	TOTAL	
\$10,000	\$2,600		\$12,600			\$12,600		\$12,600			\$12,600	\$25,200	

Example - After Deleting Cost Sharing expense

		DIRECT COST					COST SHARING						
			Institution	Institution	Institution	DIRECT		Institution	Institution	Institution	COST	GRAND	
PROJECT	FRINGE	GWU	2	3	4	COST	GWU	2	3	4	SHARING	PROJECT	
SALARY	BENEFITS	TOTAL	TOTAL	TOTAL	TOTAL	TOTAL	TOTAL	TOTAL	TOTAL	TOTAL	TOTAL	TOTAL	
\$10,000	\$2,600		\$12,600			\$12,600					\$0	\$12,600	

GW CFAR Budget Template - Sheet 1

Please note - on the spreadsheet **red text** indicates areas where values can be deleted.

Step 4 - Direct Cost and Cost Sharing Columns (cont.)

- Remember - The directions are in sequential order. Once you enter the **Personnel** and **Other Costs** expenses the **DIRECT COST** and **COST SHARING** sections will be populated automatically
- The **Personnel** and **Other Costs** expenses that are **not** being requested to be covered by the Institute are considered Cost Sharing
 - If you are cost sharing (the expense is not a direct cost) – Delete the expense from the **DIRECT COST** section
 - If you are cost sharing (the expense is not a direct cost) – Leave the expense in the **COST SHARING** section
- Example
 - The expense is being cost shared (the expense is not a direct cost)
 - The contents of the cell that is highlighted in blue are deleted (**DIRECT COST** – Institution 1 TOTAL)
 - **DIRECT COST TOTAL** automatically goes to zero (highlighted in yellow)
 - **GRAND PROJECT TOTAL** is automatically reduced (highlighted in yellow)

Example - Before Deleting Direct Cost expense

		DIRECT COST					COST SHARING						
PROJECT	FRINGE	GWU	Institution 2	Institution 3	Institution 4	DIRECT COST TOTAL	GWU	Institution 2	Institution 3	Institution 4	COST SHARING TOTAL	GRAND PROJECT TOTAL	
SALARY	BENEFITS	TOTAL	TOTAL	TOTAL	TOTAL	TOTAL	TOTAL	TOTAL	TOTAL	TOTAL	TOTAL	TOTAL	
\$10,000	\$2,600		\$12,600			\$12,600		\$12,600			\$12,600	\$25,200	

Example - After Deleting Direct Cost expense

		DIRECT COST					COST SHARING						
PROJECT	FRINGE	GWU	Institution 2	Institution 3	Institution 4	DIRECT COST TOTAL	GWU	Institution 2	Institution 3	Institution 4	COST SHARING TOTAL	GRAND PROJECT TOTAL	
SALARY	BENEFITS	TOTAL	TOTAL	TOTAL	TOTAL	TOTAL	TOTAL	TOTAL	TOTAL	TOTAL	TOTAL	TOTAL	
\$10,000	\$2,600					\$0		\$12,600			\$12,600	\$12,600	

GW CFAR Budget Template - Sheet 2

Please note - on the spreadsheet **blue text** indicates areas where values / text can be entered.

Step 5 - Merit Increase Calculation

- Many times faculty and staff receive a merit increase during the project period
 - Enter the amount of the estimated merit percent increase
- Do this for each of the institution listed
- Example
 - Suppose an institution's faculty and staff receive on average a 4% merit increase
 - Enter 4 into the cell.

Merit Increase %	
% increase	4.00%

Step 6 - Merit Increase Calculation

- Many times faculty and staff receive a merit increase during the project period
 - Enter the number of months before the merit increase is applied
 - Enter the number of months after the merit increase is applied
- Do this for each of the institution listed
- Example
 - GWU faculty receive their merit increases in July, GWU research and administrative staff receive their merit increases in January (this will vary by institution).
 - Suppose a project has a start date of (6/1/08) and an end date of May 30 (5/30/09).
 - Faculty on this project will have their original salary (w/o increase) for one month. Faculty will have their original salary plus their merit increase (w/ increase) for 11 months
 - Staff on this project will have their original salary (w/o increase) for seven months. Staff will have their original salary plus their merit increase (w/ increase) for 5 months
- The numbers that you enter will be used to calculate the PROJECT SALARY on the 'GW CFAR Budget Template - Sheet 1'

Merit Increase Calculation		
	w/o increase	w/ increase
Faculty	1	11
Research Staff	7	5

GW CFAR Budget Template - Sheet 2

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Step 7 - Fringe Benefit Rate Calculation

- Many times an institution's fringe benefit rate changes during the project period
 - Enter the first fringe rate and the number of months it will be effective for
 - Enter the second fringe rate and the number of months it will be effective for
- Do this for each of the institutions listed
- Example
 - GWU fringe benefit rate for regular salaries is 25.5% from 7/1/07 – 6/30/08. The GWU fringe benefit rate for regular salaries increases to 26.0% from 7/1/08-6/30/09.
 - Suppose a project has a start date of June 1 (6/1/08) and an end date of May 30 (5/30/09).
 - The 25.5% fringe benefit rate will be effective for one month. The 26.0% fringe benefit rate will be effective for 11 months.
 - Complete the grid as follows
 - The formula automatically averages the fringe rate

Fringe Benefit Rate Calculation		
	Fringe	Number of
Months	Rate	Months
Institution 1		
June	0.255	1
July – May	0.260	11
		0.260

GW CFAR Budget Template - Sheet 2

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Step 8 - Facilities & Administration (F&A) Rate Calculation

- Many times an institution's F&A rate changes during the project period
 - Enter the first F&A rate and the number of months it will be effective for
 - Enter the second F&A rate and the number of months it will be effective for
- Do this for each of the institution listed
- Please note –
 - The award **does not** cover intuitional F&A costs
 - The F&A cost is only calculated to show cost sharing, the amount **will not** be reimbursed.
- Example
 - GWU F&A Rate for 55.0% from 7/1/07 – 6/30/08. The GWU F&A Rate increases to 55.5% from 7/1/08-6/30/09.
 - Suppose a project has a start date of June 1 (6/1/08) and an end date of May 30 (5/30/09).
 - The 55.0% F&A rate will be effective for one month. The 55.5% F&A rate will be effective for 11 months.
 - Complete the grid as follows
 - The formula automatically averages the F&A rate

F&A Rate Calculation		
	F&A	Number of
Months	Rate	Months
Institution 1		
June	0.550	1
July - May	0.555	11
		0.555

GW CFAR Budget Template - Sheet 1

Step 9 – Total amount of funding requested

- Once the steps above have been completed the total amount of funding requested will be populated automatically in the cell highlighted in yellow on the ‘GW CFAR Budget Template - Sheet 1’
- Example
 - A total of \$40,000 is being requested from the GWU HIV/AIDS Institute

TOTAL FUNDING REQUESTED OF GWU HIV/AIDS INSTITUTE	\$40,000
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