

ORS Budget Template Workshop

- The first step in routing a proposal for University authorizations is to submit an infosheet at <https://ors.ou.edu/proposal/infosheet/infotype/CMSInfosheet.asp>
- A Proposal Development Specialist (PDS) will then send the PI an email with a list of what is needed for routing and they will attach an OU budget template with salaries entered for personnel listed on the infosheet.
- The OU template is required for routing and is considered the official budget for the proposal. If the sponsor has a budget template that is needed for the submission, your PDS can help with completing that once the OU budget is finalized.

The OU budget template can also be found on the VPRP website along with information about budget categories, budget narrative, the routing process, proposal submission, and much more.

Budget Preparation

OU Generic Budget Spreadsheets ▲

The budget template below is provided as a courtesy; however, it is recommended you contact your Proposal Development Specialist (PDS) so they can provide a template adjusted to fit the solicitation/parameters involved in your proposal (if you are not sure who your PDS might be, submit an information sheet for the proposal or refer to the **PDS/SPC** contact list.

Use of an OU budget template is required for any proposal being submitted by OU personnel. This spreadsheet is preloaded with the current Fringe Benefits, GRA Tuition, and IDC rates (full rate).

CAUTION: Using any other budget template either from a sponsor, another organization, or one that is self-developed may delay the proposal process. Only the proposal budget developed by the PI with ORS assistance is considered an official budget.

- **OU 5 Year Master Budget** (one to five years are selectable; instructions provided)

If you wish to request Activity Codes other than Research (like Other Sponsored Activity) and/or if you want to request a lower indirect cost rate such as Off Campus, read the **instructions**, and complete a **Request_Activity_Code_Reduced_IDC_Form**, and send it (with appropriate documents) to your PDS prior to finalizing your budget for the internal routing of the proposal.

If you need current indirect/Facilities and Administrative rates or other information such as mileage or per diem, refer to the website tab on **Rates and Reports**.

To view a training video focused on how to use the ORS Budget Template, visit **ORS Training and Development**.

Basic Elements of a Proposal Budget ▼

Budget Justifications ▼

UNIVERSITY of OKLAHOMA BUDGET

Budget Period 1

ENTER THE BUDGET PERIOD'S START & END DATES ON THE INFO TAB TO ACTIVATE THIS SHEET ON THE CUMULATIVE TAB

See notes at bottom of spreadsheet

| | | to | | SALARY | SPONSOR REQUEST | OU COST SHARE | TOTAL | Salary Requested | Fringe Benefits | Total |
|--|---------------|---|-------------|---------------|-----------------|---------------|--------------------|------------------|-----------------|-------|
| A. SENIOR PERSONNEL | | (Set) Appt Mos. | | | | | | | | |
| 1. Principal Investigator | 9 | FTE | x | academic mos. | | | | | | |
| | | FTE | x | summer mos. | | | | | | |
| 2. Co-Principal Investigator | 9 | FTE | x | academic mos. | | | | | | |
| | | FTE | x | summer mos. | | | | | | |
| 3. Co-Principal Investigator | 9 | FTE | x | academic mos. | | | | | | |
| | | FTE | x | summer mos. | | | | | | |
| 4. Co-Principal Investigator | 9 | FTE | x | academic mos. | | | | | | |
| | | FTE | x | summer mos. | | | | | | |
| 5. Co-Principal Investigator | 9 | FTE | x | academic mos. | | | | | | |
| | | FTE | x | summer mos. | | | | | | |
| TOTAL SENIOR PERSONNEL | | | | | | | | | | |
| | | Fringe Rate | | 34.40% | | | TOTAL | | | |
| B. OTHER PERSONNEL | | | | | | | Fringe Rate | | | |
| 1. () POST DOCTORAL ASSOCIATES | | | | | | | 21.40% | | | |
| 2. () OTHER PROFESSIONALS (TECHNICIAN, PROGRAMMER, ETC.) | | | | | | | 34.40% | | | |
| 3. () PROJECT SECRETARIAL/CLERICAL (restricted use --ask PDS) | | | | | | | 34.40% | | | |
| 4. () GRADUATE STUDENTS | # MONTHS APPT | | | | | | 7.80% | | | |
| 5. () UNDERGRADUATE STUDENTS | # MONTHS APPT | | | | | | 0.20% | | | |
| 6. () OTHER | | | | | | | 34.40% | | | |
| | | TOTAL SALARIES AND WAGES (A+B) | | | | | | | | |
| C. FRINGE BENEFITS | | (if temp employee or other FB rate needed contact PDS) | | | | | | | | |
| | | TOTAL SALARIES WAGES AND FRINGE BENFITS (A+B+C) | | | | | | | | |
| D. PERMANENT EQUIPMENT (\$5,000 PER UNIT OR FABRICATED) | | | | | | | | | | |
| item | cost | item | cost | | | | | | | |
| _____ | _____ | _____ | _____ | | | | | | | |
| _____ | _____ | _____ | _____ | | | | | | | |
| | | TOTAL PERMANENT EQUIPMENT | | | | | | | | |
| E. TRAVEL | | Domestic | _____ | | | | | | | |
| | | Foreign | _____ | | | | | | | |
| | | Use federal/state rates; Detail travel costs in budget justification | | | | | | | | |
| | | TOTAL TRAVEL | | | | | | | | |
| F. PARTICIPANT SUPPORT COSTS (used only by NSF and some DoED) | | (NON-EMPLOYEE CONFERENCE/WORKSHOP ATTENDEES) | | | | | | | | |
| 1. STIPENDS | _____ | 3. SUBSISTENCE | _____ | | | | | | | |
| 2. TRAVEL | _____ | 4. OTHER | _____ | | | | | | | |
| () Number of Participants | | TOTAL PARTICIPANT SUPPORT | | | | | | | | |
| G. OTHER DIRECT COSTS | | | | | | | | | | |
| 1. MATERIALS AND SUPPLIES | | | | | | | | | | |
| item | cost | item | cost | | | | | | | |
| _____ | _____ | _____ | _____ | | | | | | | |
| _____ | _____ | _____ | _____ | | | | | | | |