

# SAMPLE BUDGET FORMAT

**EXHIBIT B**

Attachment 1  
Cost Breakdown

**Sample**

1. **Narrative:** The following kinds of items have been taken into consideration in determining the sum total of this Agreement. Only actual will be charged.

	Function	Hrly Rate	Amount	Unit Hrly Est	Cost	Totals *
<b>A. Personnel</b>						\$
Name	PI/PD	\$		Pr/hr	\$	
Name	CoPI					
Student Assistant I		\$		330 hrs	\$	
Student Assistant II		\$		330 hrs	\$	
<b>B. Fringe Benefits</b>	PI/PD	Tbd %				
% for narrative only as % will vary	Student	@12.5%			\$	
<b>SUBTOTAL A&amp;B</b>						\$
<b>Travel &amp; Per Diem **</b>						\$
<b>Operating &amp; Equipment ***</b>			@\$			\$
List & describe						
<b>E. Materials &amp; Supplies</b>						
List						
<b>F. Subcontracts</b>						\$
List						
<b>Total Direct Cost (TDC) nte:</b>						\$
<b>Indirect Cost: (IC) nte: % TDC</b>						\$
<b>Agreement Total will not exceed:</b>						\$

\* Sum totals may have been rounded

**Sample**

Budget Notations:

\*\* **Any/all travel costs shown are estimate maximums. ONLY ACTUAL allowable will be reimbursed.** All authorized travel shall not exceed State rates and will abide by Department of Personnel Administration (DPA) travel guidelines. NO travel outside California will be reimbursed without PRIOR written authorization from the named Contract Manager. **RECEIPTS ARE REQUIRED.**

\*\*\* As is agreed, any authorized equipment that is purchased to carry out a task, will become the property of the Agency at the close of the project.

Copies of receipts are required for any/all purchases over \$500.00

IC can only be charged on the first \$25k of any authorized subcontract

Invoices submitted without supporting documentation will be considered incomplete and returned to Contractor for reprocessing.

Reimbursement for those costs will be withheld until such time the necessary documentation can be provided.



## BUDGET NARRATIVE

**Sample**

Project Phase	Fiscal Year	Total Project
Phase 1	2007/08	\$22,341
Phase 2	2008/09	\$46,402
Phase 3	2009/10	\$93,197
<b>Total:</b>		<b>\$161,940</b>

\*\*The State will contribute GIS services as well as project management and contract development and management services.

**Preliminary Itemized Budget**

	Year 1 (2008)	Year 2 (2009)	Year 3 (2010)	Total
<b>Personnel Services</b>				
Salary PI (22.5 % time)	5,601	17,139	11,650	34,390
Salary post-doctoral associate	4,700	4,787	24,500	33,987
Salary Grad Student	3,971	8,101	8,263	20,335
Total Benefits*	3,601	7,094	12,644	23,340
<b>Total Personnel</b>	<b>17,873</b>	<b>37,121</b>	<b>57,057</b>	<b>112,052</b>
<b>Subcontracts</b>				
List				
<b>Travel &amp; Per Diem</b>				
<b>Operating</b>				
Lab supplies and reagents			14,000	14,500
Disease serology			1,000	1,000
Field costs (gas, mileage)			1,000	1,000
Travel (national and international meetings)			1,000	1,000
<b>Total operating</b>			<b>17,500</b>	<b>17,500</b>
<b>Subtotal</b>	<b>17,873</b>	<b>37,121</b>	<b>74,557</b>	<b>129,552</b>
Indirect costs (___%)				
<b>Grand total</b>				

\* PI benefits at 25% because health insurance was declined; graduate students at 14%; post-doctoral associate at 35%.

**Sample**

1. Notation

PERSONNEL:

- Principal Investigator (7.2 months @ \$4,667/month)  
(assumed 2% annual salary increase Assistant Professor) \$34,390
- Post-doctoral researcher (10 months @ \$3,567/mo) \$33,987
- Graduate Student Researchers (\$2,648/mo x 0.5-time x 18 months) \$20,335

BENEFITS:

- Principal Investigator @ 25% \$ 8,598
- Post-doctoral researcher @ 35% \$ 11,895
- Graduate Student Researchers @ 14% \$ 2,847