BUDGET JUSTIFICATION: CSULB (TEMPLATE MUST be revised as needed)

SALARIES AND WAGES. The University definition of a “Year” for budgeting and management of senior and staff personnel compensation is the fiscal year (July 1 to June 30). The based salary rates are the California State University and CSULB Research Foundation established salary rate(s) paid during the Academic year and when applicable during non-academic periods. Faculty in the California State University system’s duties consists of 24 units per nine-month Academic year. Salaries are based on actual salaries (at time of proposal submission) and are projected to include for Faculty a 3.5% and for staff and students a 2% annual cost-of-living adjustment (and merit, if applicable) effective each year. Rates applied are for budgetary purposes, upon award/finalization of budget, actual rates will apply. (For NIH Submission. Remove if not applicable: “We acknowledge that according to NIH Notice OD-12-036, inflationary increases have been discontinued. However, the budget reflects the true expected project costs in the event NIH reverses the inflationary policy”).

A. SENIOR/KEY PERSONNEL (effort must be expressed in person months)

1. Principal Investigator, (Insert PI Name): Effort = (Insert total effort requesting) Academic Months, (release time of __units out of a load of ____ per semester) and or (Insert total effort of proposal) Summer Months, of project periods. Dr. (Insert PI Name) will provide overall direction and oversight of the research and the outreach projects. Responsibilities include data analysis and interpretation, drafting and dissemination of results, designing course material based on the techniques and results from the research project. In addition to overall project responsibility, the PI will supervise (Insert the number of students) Research Undergraduate/Graduate Assistance working on the project.

2. Co-Investigator/Principal Investigator, (Insert PI Name): Effort = (Insert total effort of proposal) Academic Months, (release time of __units out of a load of ____ per semester) and or (Insert total effort requesting) Summer Months, of project periods. Dr. (Insert Co-I/PI Name) will provide overall direction and oversight of the research and the outreach projects. Responsibilities include data analysis and interpretation, drafting and dissemination of results, designing course material based on the techniques and results from the research project. In addition to overall project responsibility, the Co-I/PI will co-supervise (Insert the number of students) Research Undergraduate/Graduate Assistance working on the project

B. OTHER PERSONNEL.

1. (Insert Name/TBD), (Project Coordinator/Insert Title). Effort = (Insert total effort of proposal) calendar months of project periods. The individual will assist the PI, as directed, in conducting research and contribute to the drafting and dissemination of results…
2. **TBD, Post-Doctoral Associate(s).** Effort = (Insert total effort of proposal) calendar months of project periods. The individual(s) will assist the PI, as directed, in conducting research and contribute to the drafting and dissemination of results…

3. **TBD, Research Graduate Assistant(s).** Effort = (Insert total effort of proposal) calendar months of project periods. The individual(s) will assist the PI, as directed, in conducting research and contribute to the drafting and dissemination of results…

4. **TBD, Research Undergraduate Assistant(s).** Effort = (Insert total effort of proposal) calendar months of project periods. The individual(s) will assist the PI, as directed, in conducting research and contribute to the drafting and dissemination of results…

C. **FRINGE BENEFITS.** Employee benefits are estimated using the composite benefit rate figures agreed upon by the California State University, Long Beach Research Foundation Composite Fringe Benefit Rates (CFBR) and the California State University System-wide Administration based on the Collaborative Bargaining Agreements (CBA). The rates are based on the employee groupings. The composite benefit rates used on employees in this proposal are:

- **Faculty:** 49.66% Buyout/Release/Reimbursed and 8.85% Add'l/Summer/Overload
- **CSULB:** 56.66% MPP / 45.53% Lecturers / 59.46% Staff / 8.85% Add'l Employment
- **Foundation:** 10.68% (0%-74% Time Base/Temp) / 43.85% (50%-70% Time Base/Part-Time) / 65.85% (75%-100% Time Base/Full-Time)
- **Students:** 10.68%

All benefit rates will increase by 2% annually. For more information, please see CSULB ORSP website.

D. **EQUIPMENT.** [list details of the requested items e.g., type of equipment, the need, and importance to project. Provide vendor quote(s) and state if quote(s) were from a website, catalogue, or other. Please includes Quotes with Long Beach sales tax of 10.25%, and shipping and handling expenses (pre-determined or estimated)].

The following equipment (nonexpendable tangible personal property having a useful life of more than one year, and an acquisition cost of $5,000 or more per unit) is requested in support of this project.

<table>
<thead>
<tr>
<th>Description</th>
<th>Qty</th>
<th>Cost per Unit</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td></td>
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<tr>
<td>2.</td>
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<tr>
<td>3.</td>
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</tbody>
</table>

Subtotal:  

**Additional Fees:**  
- Shipping & Handing:  
- Insurance Fees:  
- Vendor Sales Tax:  
- Local Sales @ 10.25% Tax:  
Total:
E. **TRAVEL.**
[Create a detailed budget for international travel. Include the reason for travel, destination, number of people, number of days, travel mechanism (e.g., by air/car rental/mileage/boat/other), the need and importance to project. For “Foreign Travel,” insurance coverage will need to be budgeted. Estimate Foreign Travel Insurance on a per person basis ($100.00 to $500.00). (For countries that are not on the Open Skies list under the Department of State (http://www.state.gov/e/eb/tra/ata/index.htm) or those that may be considered high-risk countries with the US, please estimate the Foreign Travel Insurance more on the higher side. If destination is unknown, state where previous functions have taken place or possible locations).]

**Domestic:** A travel budget of $ (insert total amount) is requested for the PI, Co-PI/I, and (Insert other e.g., student) to attend one (1) annual 3-day conference in years 1-4 to disseminate project results. Major conferences may include the (Insert name of potential conferences). We estimate that conferences will be held at similar venues as previously held conferences such as (Insert potential locations for conference(s)). The amount includes airfare, meals and lodging, ground transportation, and registration fees, if applicable. Estimated breakdown of costs are as follows:

<table>
<thead>
<tr>
<th># Trips</th>
<th># Days</th>
<th>PI(s)</th>
<th>Student(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Airfare</td>
<td>Meals</td>
<td>Hotel</td>
<td>Conf. Reg. PI</td>
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<td>$</td>
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**Foreign (to include Insurance):** A travel budget of $ (insert total amount) is requested for the PI, Co-PI/I, and (Insert other e.g., student) to attend one (1) annual 3-day conference in years 1-4 to disseminate project results. Major conferences may include the (Insert name of potential conferences). We estimate that conferences will be held at similar venues as previously held conferences such as (Insert potential locations for conference(s)). The amount includes airfare, meals and lodging, ground transportation, and registration fees, if applicable. Estimated breakdown of costs are as follows:

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</tr>
<tr>
<td>$</td>
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</tr>
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</table>

F. **PARTICIPANT SUPPORT.** [List the expenses and its relevance to achieving the project goals. NOT APPLICABLE TO GRADUATE AND/OR UNDERGRADUATE STUDENTS ALREADY LISTED FOR HIRE UNDER THIS GRANT.]

Number of Participants: ___

1. Scholarships:
2. Student Travel:
   - Domestic.
   - Foreign.
3. Subsistence:
4. Other:

G. **OTHER DIRECT COSTS.** [List expenses and its relevance to achieving the project goals].
1. **Materials and Supplies**: List the total funds requested for materials and supplies; indicate general categories such as glassware, chemicals, animal costs, etc., including an amount for each category. Categories with amounts less than $1,000 are not required to be itemized.

2. **Publication/Documentation/Dissemination**: List the total funds requested for publication costs; may request funds for the costs of documenting, preparing, publishing, or otherwise making available to others, the findings and products of the work conducted under the award. Include supporting information, if applicable.

3. **Consultant Services**: Itemize each consultant, organizational affiliation, rate per day, number of days, any additional costs such as travel, lodging, supplies, and total cost for each consultant. Note: These individuals may provide advice, but should not be described as making decisions for the direction of the research. This is the role of a subrecipient/subcontractor.

4. **Computer Services**: List the total funds requested for ADP/computer services; the cost of computer services, including computer-based retrieval of scientific, technical, and education information may be requested. Include the established computer service rates at the proposing organization, if applicable.

5. **Subaward(s)/Consortium/Contractual Costs**: Identify and briefly describe other institutions involved in the project including the entity’s role in programmatic decision-making (i.e. making decisions for the direction of the research) and total costs requested for each.

6. **Other Operating Expenses**: Any other direct costs not specified in categories above must be identified, itemized, and detailed in the budget justification e.g., telephone service, lab service, & Internal or external Vendor Costs, will need to provide name of Vendor/Service.

7. **Participant Incentives**: List number of participants, significance to project and detail description of incentive e.g., gift cards <$25, parking fees, etc. **NOT APPLICABLE TO CSULB EMPLOYEES**.

8. **Equipment or Facility Rental/User Fees**: List the total funds requested for equipment (based on University policy) or facility rental/user fees; identify and justify each rental user fee.

9. **Alterations & Renovations**: List the total funds requested for alterations and renovations; itemize by category and justify the costs of alterations and renovations, including repairs, painting, and removal or installation of partitions, shielding, or air conditioning. Where applicable, provide the square footage and costs.

H. **TOTAL DIRECT COSTS**. ($                      )

I. **INDIRECT COSTS**. ($                      )

*Choose one from below ↓ and delete what is NOT applicable*
**REGULAR RATE** CSULB Research Foundation’s indirect costs (F&A) are calculated using the Modified Total Direct Cost (MTDC) base at the DHHS federally negotiated agreement rate of 47.5% effective as of 07/01/2017-06/30/2021 on projects sponsored through government grants or per programs guidelines. The MTDC base consists of all salaries and wages, benefits, supplies, services, travel, and the first $25,000 of each subaward. Equipment, student fees/scholarship, off site facility rentals, and the portion of each subaward in excess of $25,000 are excluded from the MTDC calculations.

**(OR) OFF CAMPUS RATE** *(MUST obtain approval first from ORSP AVP before moving forward with budget.)* CSULB Research Foundation’s Off-Campus DHHS federally negotiated rate of 26% effective as of 07/01/2017-06/30/2021 on projects sponsored through government grants or per programs guidelines. The MTDC base consists of all salaries and wages, benefits, supplies, services, travel, and the first $25,000 of each subaward. Equipment, student fees/scholarship, off site facility rentals, and the portion of each subaward in excess of $25,000 are excluded from the MTDC calculations.

**(OR) RATE NOT ALLOWED or RESTRICTED BY SPONSOR** CSULB Research Foundation’s Federal negotiated rates as stipulated in the cost rate agreement with DHHS dated October 11, 2017 are not applicable with this proposal submission due to sponsoring agency’s guidelines restricting institutional overhead and or administrative charges to 0% or (Insert____% or delete this section).

**(OR) CA AGREEMENT** CSULB Research Foundation’s Federal negotiated rates as stipulated in the cost rate agreement with DHHS dated October 11, 2017 are not applicable with this proposal submission due to California State University’s Sub-Recipient Policy for California State-funded projects restricting institutional overhead or administrative charges to 35%.

**J. TOTAL DIRECT AND INDIRECT COSTS.** ($

**H. COST SHARE/MATCH.** *Choose one from below ↓ and delete what is NOT applicable

**General Submission:** Cost share is not required, implied, nor inferred from other statements in the project description, project summary, budget justification or other sections of this proposal.

**(OR) NSF Submission:** Cost share exceeding the amount listed on Line M of this budget is not implied nor inferred from other statements in the project description, project summary, budget justification or other sections of this proposal.

**(OR) Cost Match/Share Submission: (Must be required by SPONSOR)** The proposal with (Insert Sponsor Name here) will be supported by the department of (Insert PI/PD Department here) in the school of (Insert PI/PD college here) for the duration of (Insert project period of obligation). The cost match obligation is as follows:

[to complete sections below follow the instructions from each section above and as applicable to match.]

I. Salaries/Wages.
   o Fringe Benefits.

II. Equipment.
III. Travel.
IV. Participant Support.
V. Other Direct Costs.
VI. Total Direct Costs: $________
VII. Indirect Cost (F&A): @ ____% = $________
VIII. Forgone (Unrecovered) Indirect Cost (F&A): @ ____% = $_______ (If applicable)
IX. Total Cost Match Obligation: $_____________