



# Symposium for Research Administrators

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University of Wisconsin-Madison  
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# Building Better Budgets for RAMP

## From Proposal to Closeout

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Sarah Marcotte

Research Administrator – School of Human Ecology

Zach Smith

Research Administrator Supervisor – Dept of Mechanical Engineering

Andrea Zorbas

Award Set-up Manager – Research and Sponsored Programs

# Reminders

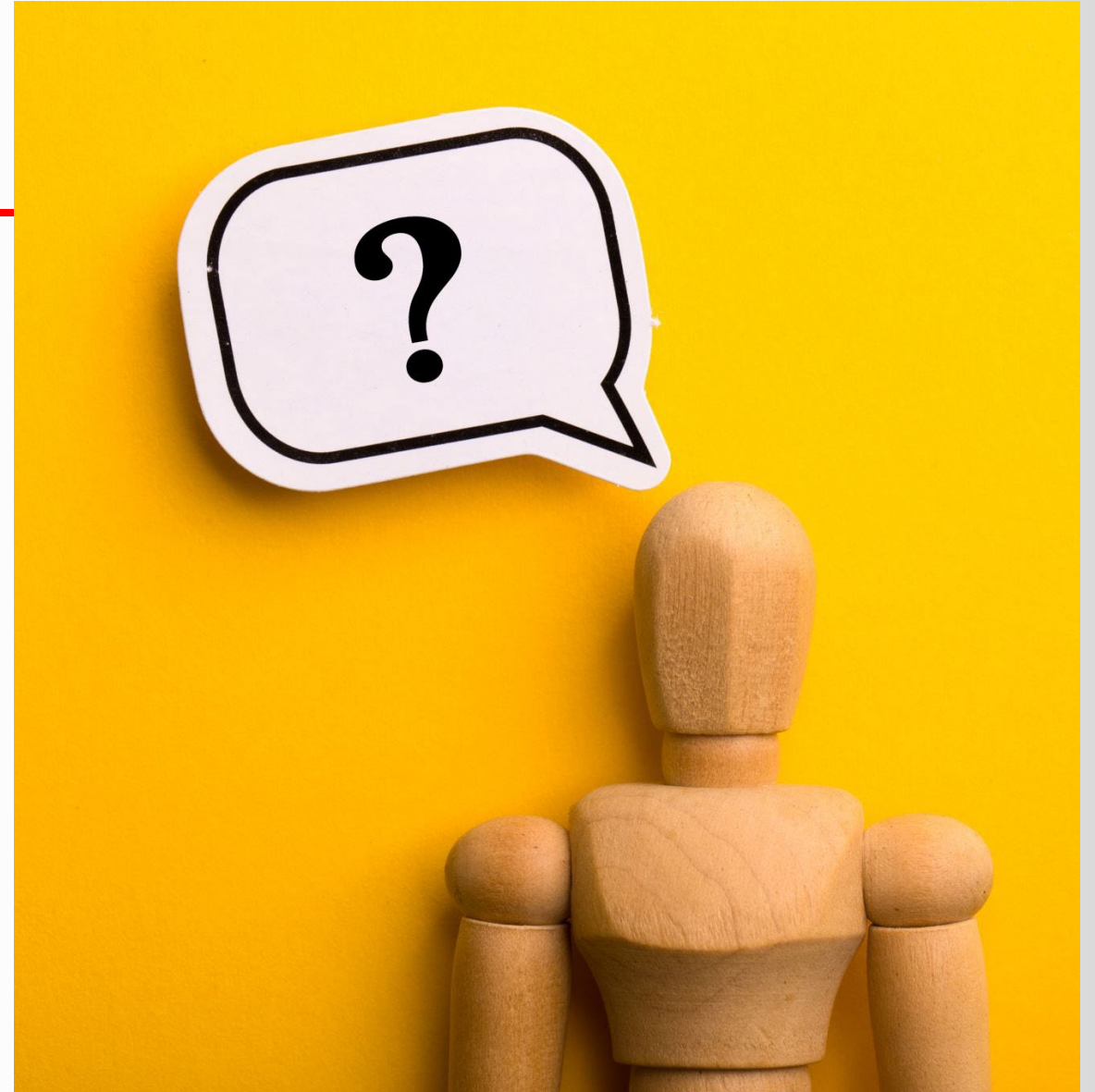
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## This is:

- A conversation about budgets
- Discussion around budget best practices

## This is not:

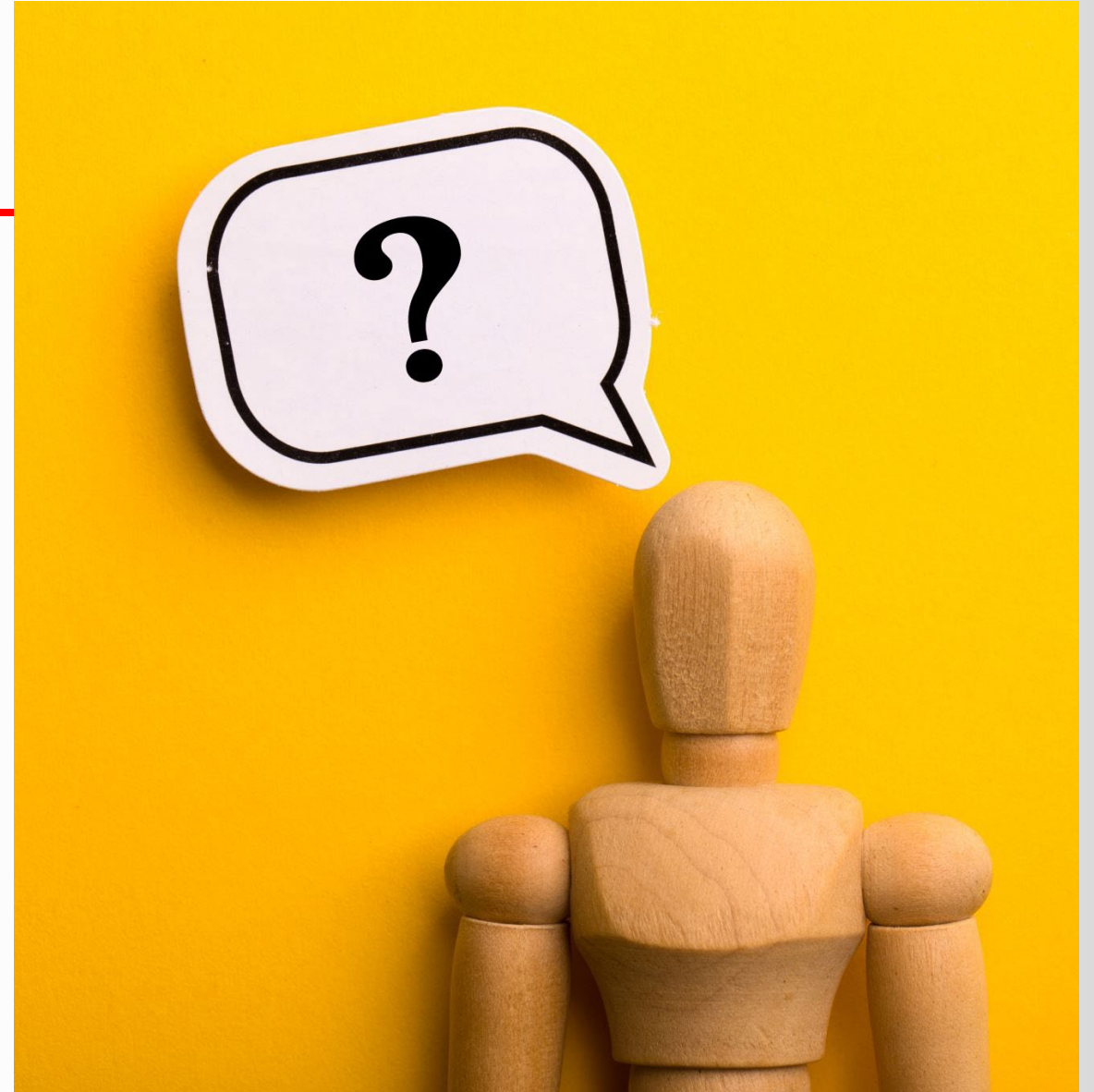
- A how to



# Introductions

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## Who are you?



# Outline of Session

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- RAMP Limitations / Requirements
- Budget Considerations
- Best Practices
  - Budget Templates
  - RAMP Funding Proposal Entry
  - RAMP Award Setup/Modification Entry
- Budget Template
- Questions and Responses

# Learning Objectives

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- Understand budget limitations/requirements in RAMP
- Identify vital considerations when crafting budgets
- Learn best practices for budget creation
- Learn best practices for RAMP entry of budgets and budget reconciliation
- Discover a new budget template



# Ramp Observations

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What have you noticed in Funding  
Proposal Budgets?



# FP Observations +/-

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## Increased Functionality

- Categorical budgets
- Separate projects
- Authorized & unauthorized amounts
- Flexible out years
- Inflation rates

## Limitations

- Annualized Salary for all
- Clunky
- Doesn't show cost/person
- Folds fringe in
- Each item must be created
- Different screens for costs / items



# Budget Observations

- What template(s) do you use?
- Do you create RAMP budgets?
- What issues are you having with your current budget templates when translating to RAMP?

## Proposal Budget Template

To be included with full proposal only.  
This form is also available for download at [www.greenbelt.ca](http://www.greenbelt.ca).

EXPENSES	TOTAL	Friends of the Greenbelt Foundation Share
<b>PERSONNEL</b>		
<i>(Itemize all positions indicating percent of time, salary, names, titles/functions of all personnel. Attach additional sheet if necessary.)</i>		
<i>Fringe benefits (specify rate and base)</i>		
Subtotal Personnel		
CONSULTANTS		
TRAVEL		
MATERIALS, SUPPLIES & EQUIPMENT		
COMMUNICATIONS COSTS		
OVERHEAD		
OTHER EXPENSES <i>(itemize)</i>		
GST		
<b>TOTAL EXPENDITURES</b>		
<b>INCOME</b>	<b>TOTAL</b>	<b>Committed to date</b>
FOUNDATIONS <i>Friends of the Greenbelt Foundation share</i>		
GOVERNMENT		
CORPORATIONS		
INDIVIDUAL DONORS		
OTHER INCOME <i>(specify)</i>		
<b>TOTAL REVENUES</b>		
<b>TOTAL PROJECT COST</b>		

# Budget Template Issues

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- Overall – Rounding
- Overall – Loaded Numbers
- Effort – Months / Percentages
- Effort – Annualized Salaries
- Travel – Per Trip
- Subs – Direct Costs / Indirect Costs
- Subs and Sub Projects
- Others?





# Considerations

## Annualized Formulas and Variable Effort

Salary		Effort in Months										
Base	Appointment	Yr 1	Yr 2	Yr 3	Yr 4	Yr 5	12-Month	9-Month	Hourly Ra	Hours	Salary	F/B
\$ 100,000.00	C/9	1.00	1.00	1.00	1.00	1.00	\$ 133,333	\$ 100,000	\$ 64.103	173.33	\$ 11,111	\$ 4,067
\$ -	Choose:	0.00	0.00	0.00	0.00	0.00	\$ -	\$ -	\$ -	0.00	\$ -	\$ -
\$ -	Choose:	0.00	0.00	0.00	0.00	0.00	\$ -	\$ -	\$ -	0.00	\$ -	\$ -
\$ -	Choose:	0.00	0.00	0.00	0.00	0.00	\$ -	\$ -	\$ -	0.00	\$ -	\$ -
\$ -	Choose:	0.00	0.00	0.00	0.00	0.00	\$ -	\$ -	\$ -	0.00	\$ -	\$ -
\$ -	Choose:	0.00	0.00	0.00	0.00	0.00	\$ -	\$ -	\$ -	0.00	\$ -	\$ -
Total Senior Personnel										\$ 11,111	\$ 4,067	

# Considerations

## Budgeting Travel per Person per Trip

42		
43	<b>E. Travel</b>	
44	Domestic	use travel worksheet
45	International	use travel worksheet
46	Total	
47		

	Domestic/Intl	Business Purpose	Conference or Meeting	Depart	Arrive	# Days	# Travelers	Traveler Names	Ground Transport	Flight	Registration	Other
Year	Select Option			MSN		0	0		\$ -	\$ -	\$ -	\$ -
Year	Select Option			MSN		0	0		\$ -	\$ -	\$ -	\$ -
Year	Select Option			MSN		0	0		\$ -	\$ -	\$ -	\$ -
Year	Select Option			MSN		0	0		\$ -	\$ -	\$ -	\$ -
Year	Select Option			MSN		0	0		\$ -	\$ -	\$ -	\$ -

# Considerations

## Breaking out Direct and Indirect Costs for Subs Separate Lines for Each Sub

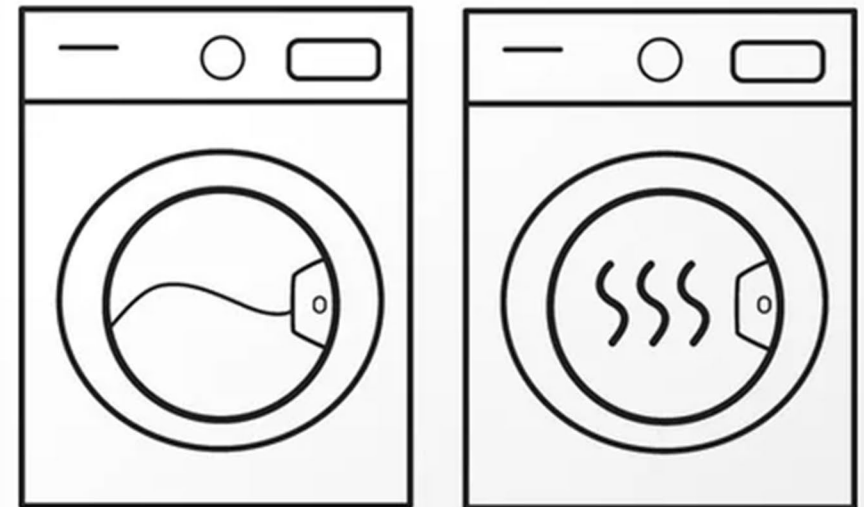
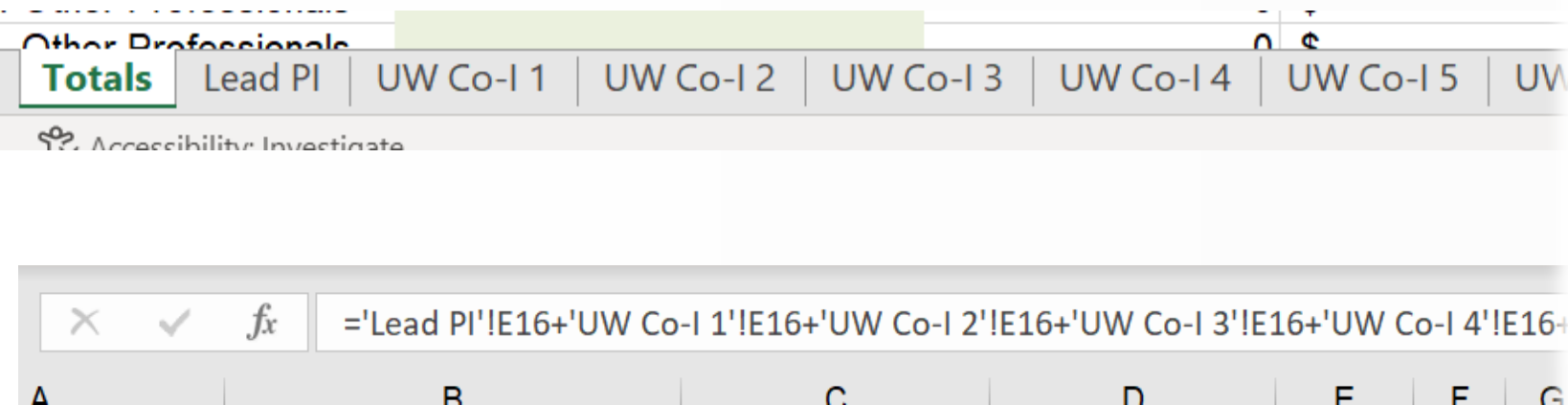
2. Publications		\$ -		
3. Consultant Services		\$ 5,000		
4. ADP/Computer Services		\$ -	DCs	IDCs
5. Subcontracts	OSU	\$ -	\$ -	\$ -
5. Subcontracts	LSU	\$ 25,000	\$ 15,000	\$ 10,000
5. Subcontracts	ASU	\$ -	\$ -	\$ -
5. Subcontracts	IU	\$ -	\$ -	\$ -
6. Equipment or Facility Rental/User Fees		\$ -		
7. Alterations and Renovations		\$ -		

# Considerations

## Budget for Each Sub / Sub-Project

Separate Tab for Each Project

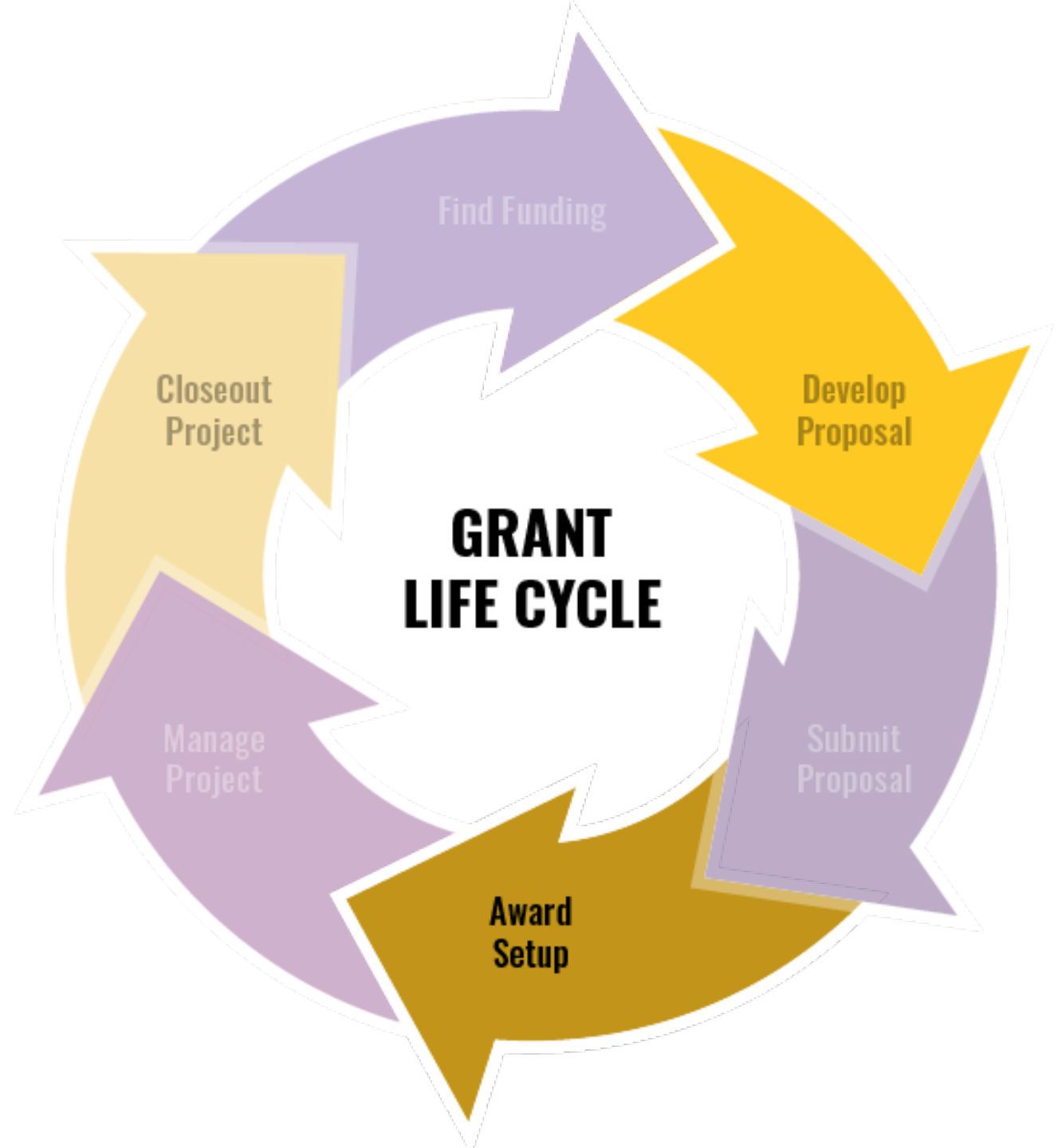
GOTTA  
KEEP 'EM  
SEPARATED



# Award Setup

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What are your observations  
regarding Award Setup  
– in terms of budget entry/setup?





# Setup Observations +/-

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## Increased Functionality

- Categorical budgets
- Separate projects
- Authorized & unauthorized amounts
- Flexible out years
- Can copy

## Challenges

- Different terminology
- Confusion on out years
- Separating projects out
- Access (ARs for other RAs)
- No totals on Setup
- No cumulative totals for Financial Accounts
- Effort – current or all?
- Cost sharing amounts / effort

# Best Practices

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# Solid Foundation

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Update your budget  
templates

- even update older  
submissions when awarded



# Read the Notice of the Award

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Look for incremental funding

Know your sponsors! Will these increments be clean or not?



Check if there is carryover



Look for funding contingent upon a continuation application or other milestones

It's possible the entire amount is earmarked/awarded, BUT in the Ts&Cs it may restrict to BP1 or Tasks

# Financial Account Setup



# Financial Accounts = Projects

Create unique sub projects for PI, Co-PIs, Co-Is and Subs

## Financial Setup

### 1. \* Financial accounts:

	Name	Project ID	Project Start	Project End	PI	Responsible Unit	IDC Base	Active
<a href="#">View</a>	Edwards BENEFIT		10/1/2023	9/30/2026	MORGAN EDWARDS	LAFOLLET PUBL AF*LAF PUB AF	MTDC	True
<a href="#">View</a>	Mahvi BENEFIT Project		10/1/2023	9/30/2026	ALLISON MAHVI	MECHANICAL ENGR*MECH ENGR	MTDC	True
<a href="#">View</a>	NET Energy Sub BENEFIT		10/1/2023	9/30/2026	ALLISON MAHVI	MECHANICAL ENGR*MECH ENGR	MTDC	True
<a href="#">View</a>	Purdue Sub BENEFIT		10/1/2023	9/30/2026	ALLISON MAHVI	MECHANICAL ENGR*MECH ENGR	MTDC	True
<a href="#">View</a>	TAMU Sub BENEFIT		10/1/2023	9/30/2026	ALLISON MAHVI	MECHANICAL ENGR*MECH ENGR	MTDC	True
<a href="#">View</a>	Wagner BENEFIT		10/1/2023	9/30/2026	MICHAEL WAGNER	MECHANICAL ENGR*MECH ENGR	MTDC	True

# Allocate Budgets

Enter budget allocations

Authorized and Unauthorized

How many periods???

Financial Account Name	Project ID	Period Number	Name	Start Date	End Date	Authorization	Authorized Amount	Awarded Amount
Edwards BENEFIT		1	Edwards Sub Authorized	10/1/2023	9/30/2024	Authorized by Sponsor	\$96,052	\$96,052
Edwards BENEFIT		2	Edwards Sub Unauthorized	10/1/2024	9/30/2025	Not Authorized	\$0	\$98,573
Mahvi BENEFIT Project		1	Mahvi Authorized	10/1/2023	9/30/2024	Authorized by Sponsor	\$120,541	\$120,541
Mahvi BENEFIT Project		2	Mahvi Unauthorized	10/1/2024	9/30/2025	Not Authorized	\$0	\$123,525
Mahvi BENEFIT Project		3	Mahvi Unauthorized	10/1/2025	9/30/2026	Not Authorized	\$0	\$113,370
NET Energy Sub BENEFIT		1	NET Energy Sub Allocation	10/1/2023	9/30/2024	Authorized by Sponsor	\$49,479	\$49,479
NET Energy Sub BENEFIT		2	NET Energy Sub Non Auth	10/1/2024	9/30/2025	Not Authorized	\$0	\$214,135

◀ Go to 1

# Reconcile Budgets

- Only for authorized amounts
- Cost share or no cost share?

Select the Budget Allocation to display: ?

Edwards Sub Authorized ▼

Start Date: 10/1/2023

End Date: 9/30/2024

Budget Categories		Baseline	Rollup Adjustments	Adjustments	Cost Share	Activ
ZSALRY - Salaries-prjbud	SALARY	\$0	\$0	\$42,760	\$11,492	
ZFRING - Fringes-prjbud	FRINGE	\$0	\$0	\$11,293	\$4,206	
ZTRAVD - Travel Domestic-prjbud	TRAVEL_DOM	\$0	\$0	\$0	\$0	
ZTRAVF - Travel Foreign-prjbud	TRAVEL_FOR	\$0	\$0	\$0	\$0	



# Time Out

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How does this affect our budget for future allocations?



# Budget Template Thoughts

When entering authorized amounts – update your excel budget

Create an increment tab that will calculate next allocations

Year 3		Year 4		Year 5		Total		Increment 1	Increment 2
\$	%	\$	%	\$	%	\$	%	\$	\$
26,079	32%	\$ 21,273	29%	\$ 19,082	27%	\$ 160,549	34%	\$ 142,000	\$ 200,000
4,652	6%	\$ 4,733	6%	\$ 4,867	7%	\$ 23,834	5%	\$ 4,770	\$ 696
-	0%	\$ -	0%	\$ -	0%	\$ -	0%	\$ -	\$ -
-	0%	\$ -	0%	\$ -	0%	\$ -	0%	\$ -	\$ -
-	0%	\$ -	0%	\$ -	0%	\$ 10,000	2%	\$ 10,000	\$ -
-	0%	\$ -	0%	\$ -	0%	\$ -	0%	\$ -	\$ -
-	0%	\$ -	0%	\$ -	0%	\$ -	0%	\$ -	\$ -
-	0%	\$ -	0%	\$ -	0%	\$ -	0%	\$ -	\$ -
-	0%	\$ -	0%	\$ -	0%	\$ -	0%	\$ -	\$ -
-	0%	\$ -	0%	\$ -	0%	\$ -	0%	\$ -	\$ -
-	0%	\$ -	0%	\$ -	0%	\$ -	0%	\$ -	\$ -

# Demonstration

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# Reflections & Questions

# Contact Info

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Sarah Marcotte

[sarah.marcotte@wisc.edu](mailto:sarah.marcotte@wisc.edu)

Zach Smith

[rsmith48@wisc.edu](mailto:rsmith48@wisc.edu)

Andrea Zorbas

[zorbas@wisc.edu](mailto:zorbas@wisc.edu)