

10th ANNUAL
SYMPOSIUM
FOR
RESEARCH
ADMINISTRATORS

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...be inspiRED

RED

Research. Education. Development.

Show Me the Money

Building a Winning Grant Budget

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Budget Building – Where to Begin?

- Budget Policies
 - Uniform Guidance
 - Sponsor
 - RSP
 - Dean's Office

Uniform Guidance

[2 CFR Part 200, Subpart E](#)

4 Key Principles

Allowable

Reasonable

Allocable

Consistently
treated

Cost Types

Direct Costs

Indirect Costs

Direct vs. Indirect

Direct Costs

Faculty/Staff Time
Associated Fringe Benefits
Travel related to project
Materials and Supplies
Equipment
Animal Costs
Facility Fees
Subawards
Consultants
Computing Fees
Tuition Remission
Human Subjects/Clinical Trial Costs

Indirect Costs

Admin/Clerical Time & Fringe*
Utilities (Lights, Water, Heat, A/C)
Office Supplies*
Phones*
Routine maintenance of equipment and buildings

Cost Principles

Now What?



- Sponsor Budget Guidelines
 - Agency grant guide
 - Funding announcement
- Look for:
 - Project Period
 - Minimum and maximum budget amounts
 - IDC Type & Rate – MTDC or TDC
 - Any unallowable costs
 - Other budgetary requirements

Sponsor Guidelines

Then what?



- Ask PI for their budget “wish-list”
 - Project personnel and effort
 - Capital equipment
 - Travel
 - Materials & Supplies
 - Animals/Human Subjects
 - Facility Fees
 - Subawards
 - Other Direct Costs

Budget Strategies for creating good budgets

- Personnel
 - Salary
 - Staff, Post Docs, Grad Students, Student Hourlies
 - Escalations? Yay or Nay? What does the sponsor say?
 - Effort
 - Over commitment
 - Required to meet goals/AIMS
- Cost Share
 - Avoid it

Budget Strategies for creating good budgets

Personnel Effort

- Propose effort that makes sense: 5% instead of 4.898752% to get to a target dollar value.
 - Goal Seek is GREAT! Don't use it for effort, use it for materials, travel or other direct costs to avoid multiple places behind the decimal.
- Person Month vs Percent
 - Does it matter? If so, when?

Equipment

- If you ask for it, buy it!
 - Buy it in the budget period you request it in your budget. Waiting could have implications that make it harder to purchase later.
- Be prepared to provide a quote!

Budget Strategies for creating good budgets

Travel

- Refer to GSA amounts for lodging and per diem per location
- Lookup airfare for cost estimate
- Be strategic about foreign travel

<https://www.wisconsin.edu/travel/lodging-and-meal-per-diem-calculator/>

Materials & Supplies

- Be realistic, not greedy
- Standard lab supplies? Be prepared to list those supplies
- Are estimates or categorical detailed costs required in the justification?
- Standard office supplies need not apply

Budget Strategies for creating good budgets

Other Direct Costs (ODCs)

- Publications
- Consultant Services
- Computer Services (ADPE)

Other Direct Costs to Consider

- Cloud Computing Costs
 - AWS, Azure, GPC Services Only
- Tuition Remission
- Equipment

Why are these different?

Indirect Costs (IDCs)

MTDC vs. TDC

What is the difference?

How does this impact your budget?

NIH R21

- Modular Budget
 - AKA: PHS398
- Salary Cap
 - Most likely to discourage escalations
- Subawards

| | |
|-----------------------------|--|
| Award Budget | The combined budget for direct costs for the two-year project period may not exceed \$275,000. No more than \$200,000 may be requested in any single year. |
| Award Project Period | The total project period may not exceed 2 years. |

Modular Budget Guidelines:

Modular budgets are simplified; therefore, detailed categorical information is not to be submitted with the application.

For all modular budgets, request total direct costs (**in modules of \$25,000**), reflecting appropriate support for the project. There will be no future year escalations. A typical modular grant application will request the same number of modules in each budget period. Provide an additional narrative budget justification (in the [Additional Narrative Justification](#) section) for any variation in the number of modules requested.

<https://grants.nih.gov/grants-process/write-application/how-to-apply-application-guide>

Budgets with Cost Share

- Dept/College buy in
- Active projects/dept funds to support cost share
- Collaborator cost share contributions

5. Cost Sharing or Matching

The Federal share of an SS4A grant may not exceed 80 percent of total eligible SS4A project costs. Recipients are required to contribute a local matching share of no less than 20 percent of total eligible project costs. Unless otherwise authorized by statute, all matching contributions must be from non-Federal sources. Applicants that intend to combine SS4A funds with Federal-Aid funds provided under Title 23 U.S.C. could experience a significant delay in programming funding and executing a grant agreement.

NSF Career

- Review FOA
- Career Specifics may apply vs standard NSF submissions
- Program officer Input may apply

<https://www.nsf.gov/policies/pappg>

Other Budgetary Limitations:

The CAREER award, including indirect costs, is expected to total a minimum of \$400,000 for the 5-year duration, with the following exceptions: Awards for proposals to the Directorate for Biological Sciences (BIO), the Directorate for Engineering (ENG), or the Office of Polar Programs (OPP) are expected to total a minimum of \$500,000 for the 5-year duration. Awards for proposals to the Directorate for Computer and Information Science and Engineering are expected to support one month of PI salary per year, one graduate student per year, and two trips per year; this may vary depending on individual circumstances, e.g., if the PI already has salary support. Before preparing a CAREER proposal, PIs are strongly encouraged to contact their disciplinary Program Officer or the appropriate CAREER contact to discuss budget requests for their proposed CAREER activities, and typical funding levels for their discipline. Many programs and Directorates prefer to make more awards by funding CAREER proposals closer to the minimum award size. Proposers should also review the list of recent CAREER awards made in their discipline for guidance on average award size. A list of CAREER Division/Directorate Contacts can be found on the CAREER web page at <https://www.nsf.gov/crssprgm/career/contacts.jsp>.

Co-PIs are not allowed in CAREER proposals. Support for other senior/key personnel (i.e., in the Budget Category A) or consultants is permitted, but must be commensurate with their limited role in the project. In particular, while recognizing that projects may entail cross-disciplinary collaborations, it is expected that the primary support for a CAREER award will be for the PI and his/her research efforts. All other allowable costs, as described in the PAPPG, are permitted. Allowable costs include funds for postdoctoral fellows, graduate students, undergraduate students, PI salary, education or outreach activities, support for an evaluator, travel and subsistence expenses for the PI and U.S. participants when working abroad with foreign collaborators, and consultant expenses. In some cases, it may be appropriate to include academic year salary support for the PI on a CAREER budget (for example, PIs who have heavy teaching responsibilities or who must conduct field work during the academic year). Proposers should talk to the cognizant Program Officers about their individual cases.

Thank you!

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