

# BUDGET WORKBOOK (Alternate)

## A. General Overview

The Budget Workbook contains spreadsheets to be completed for each participating Institution. Proposals must provide budgets for at least one Canadian university and one University of California campus. This workbook has spreadsheets for one UC Campus and up to 14 Canadian collaborators. Each Canadian institution must complete a separate spreadsheet. Additional UC campuses that incur direct costs may include these on the designated cells of the UC spreadsheet

Enter Canadian budgets in Canadian Dollars (CDN). The last page of the workbook is a budget summary that will be automatically calculated from the information provided in the spreadsheets.

## B. Allowable Costs

Allowable costs for each type of proposal are described in the paragraphs below. Please note that personnel costs are limited to time spent on activities related to collaboration, follow-up research or feasibility studies (not "business as usual research").

### *Proposals to Conduct Collaborative Events (up to \$50,000)*

Applicants may request one year of funding up to \$50,000 total. CCSIP funds may be applied to travel and accommodation for invited speakers and event participants (including the exchange of students, faculty and other research talent); organization and management of the collaborative event (including the salaries for personnel who will plan and manage the event; logistics and associated event expenditures such as venue, catering, audio-visual equipment etc.); follow-up research, communications and/or other actions emerging from the event.

### *Proposal for Development and Delivery of Business Plans (up to \$100,000)*

Applicants may request one year of funding up to \$100,000 total. CCSIP funds may be applied to the conduct or purchase of competitive intelligence or market research; the conduct of a feasibility study; reasonable legal fees, for example, to acquire guidance on intellectual property management/sharing issues; salaries or consulting fees for business or management experts who will contribute to the development of the business plan; travel and accommodation for team members (including the exchange of students, faculty and other research talent); the conduct of associated stakeholder outreach or events (leading-up to or following development of the business plan) and publication and/or communication expenditures.

## C. Non-Allowable Costs

Indirect costs, purchase of equipment (Equipment is defined as non-expendable, tangible personal property with an acquisition cost of \$5000 or more per item and a life expectancy of more than one year), and graduate student tuition and fees are not allowed for either type of proposal. Each PI must follow his/her own intuitional guidelines regarding allowable costs and expenditures.

## D. Instructions

**I. Fill out forms** : Provide requested information (indicated in yellow) on each form worksheet. Skip worksheets that are not applicable to your proposal

- Worksheet 1. Budget – UC Campus: **Required for all proposals** . Enter all costs in US Dollars (USD).
- Worksheet 2. Budget – Canadian Campus1: **Required for all proposals**. Enter costs in Canadian Dollars (CDN).
- Worksheet 3. Budget – Canadian Campus2 : **only if applicable**. Enter all costs in CDN.
- Worksheet 4. Budget – Canadian Campus3 : **only if applicable**. Enter all costs in CDN
- Worksheet 5. Budget – Canadian Campus4 : **only if applicable**. Enter all costs in CDN.
- Worksheet 6. Budget – Canadian Campus5 : **only if applicable**. Enter all costs in CDN.
- Worksheet 7. Budget – Canadian Campus6 : **only if applicable** . Enter all costs in CDN.
- Worksheet 8. Budget – Canadian Campus7 : **only if applicable** . Enter all costs in CDN.
- Worksheet 9. Budget – Canadian Campus8 : **only if applicable** . Enter all costs in CDN.
- Worksheet 10. Budget – Canadian Campus9 : **only if applicable**. Enter all costs in CDN.

Worksheet 11. Budget – Canadian Campus10 : *only if applicable* . Enter all costs in CDN.  
Worksheet 12. Budget – Canadian Campus11 : *only if applicable* . Enter all costs in CDN.  
Worksheet 13. Budget – Canadian Campus12 : *only if applicable* . Enter all costs in CDN.  
Worksheet 14. Budget – Canadian Campus13 : *only if applicable* . Enter all costs in CDN.  
Worksheet 15. Budget – Canadian Campus14 : *only if applicable* . Enter all costs in CDN.  
Worksheet 16. Industry or Other (Canada): *only if applicable* . Enter costs in CDN.  
Worksheet 17. Industry of Other (US): *only if applicable* Enter costs in USD  
Worksheet 18. Summary: Enter PI Name only. No other entry required. Form automatically completed from worksheets 1-17.

**2. Review Budget Summary :** The Budget Summary (worksheet #18) summarizes information entered in worksheets 1-17. Check information, and make any necessary corrections to the relevant worksheets.

**3. Convert Worksheets to PDF :** Convert completed worksheets to PDF using the print to PDF function or a PDF generator like Adobe Acrobat. Review forms carefully to ensure all numbers are legible. For help with PDF conversion contact Proposal Central.

**4. Upload PDF Forms and Excel Workbook to proposalCENTRAL :** Once forms have been converted to PDF, upload PDF forms and the completed excel workbook to proposalCENTRAL using the appropriate attachment type. See proposalCENTRAL for help with uploading attachments to the proposal.

Applicant Principal Investigator: \_\_\_\_\_

**Budget Details - UC - Campus**

Provide budget details on expenditures at the lead UC partner campus only. If there is more than one Collaborating UC Campus please enter the total Direct Cost to be incurred by each campus separately in the space provided below. Enter costs in US Dollars. Provide explanation of expenditures separately in the Budget Justification.

Campus Location: \_\_\_\_\_ <Enter name of campus

Personnel Salary + Benefits		Amount in USD	
Name	Role on Project	Salary	Benefits
<b>Sub-Totals:</b>		\$ -	\$ -
<b>A. Total Salary + Benefits:</b>		\$ -	
Non-Personnel Budget		Amount in USD	
Consultants			
Supplies			
Meeting Costs (Conference room, catering, etc.)			
Travel and Accommodations			
Other			
<b>B1. Total Non-Personnel:</b>		\$ -	
Direct Costs Incurred by Collaborating UC Campuses (if applicable)		Amount in USD	
Enter Name UC Campus 1			
Enter Name UC Campus 2			
Enter Name UC Campus 3			
Enter Name UC Campus 4			
Enter Name UC Campus 5			
Enter Name UC Campus 6			
Enter Name UC Campus 7			
Enter Name UC Campus 8			
Enter Name UC Campus 9			
<b>B2. Total Collaborating UC Direct Costs:</b>		\$ -	
<b>C. Total Requested Direct Costs (A + B):</b>		\$ -	
D. In-Kind Contributions		Amount in USD	
Cash (in-kind)			
Supplies (in-kind)			
Other (in-kind)			
<b>E. Total In-kind:</b>		\$ -	
<b>F. Total UC Campus:</b>		\$ -	































Applicant Principal Investigator:

**Budget Details - United States Industry or Other Partner**

Provide budget details on expenditures at the Canadian Industry or other partner only. Co-applicants from non-participating universities must have explicit support from their Vice President, Research to contribute to the proposal, and secure appropriate funding from their university or an alternate investor to cover their expenses in the project. Provide explanation of expenditures separately in the Budget Justification form.

Industry or Other: <Enter name of partner

Personnel		Amount USD	
Name	Role on Project	Salary	Benefits
<b>Sub-Totals:</b>		\$ -	\$ -
<b>A. Salary + Benefits:</b>		\$ -	
<b>Non-Personnel Budget</b>			
Consultants			
Supplies			
Meeting Costs (Conference room, catering, etc.)			
Travel and Accommodations			
Other			
<b>B. Total Non-Personnel:</b>		\$ -	
<b>C. Total Contributed Direct Costs (A + B):</b>		\$ -	
<b>D. In-Kind Contributions</b>			
Cash (in-kind)			
Supplies (in-kind)			
Other (in-kind)			
<b>E. Total In-kind:</b>		\$ -	
<b>F. Total Industry or Other Contribution:</b>		\$ -	

Applicant Principal Investigator:

## Budget Summary

Canadian Campus(es) - Budget Summary	Total
Personnel (salary + benefits)	\$ -
Consultants	\$ -
Supplies	\$ -
Meeting Costs (Conference room, catering, etc.)	\$ -
Travel and Accomodations	\$ -
Other	\$ -
<b>A. Total Requested Direct Costs</b>	<b>\$ -</b>
<b>B. Total In-kind</b>	<b>\$ -</b>
<b>C. Total (CDN)</b>	<b>\$ -</b>
<b>D. Total USD (1.25)</b>	<b>\$ -</b>

UC Campus(es) - Budget Summary	Total
Personnel (salary + benefits)	\$ -
Consultants	\$ -
Supplies	\$ -
Meeting Costs (Conference room, catering, etc.)	\$ -
Travel and Accomodations	\$ -
Other	\$ -
Total redisbursed to UC Campuses	\$ -
<b>E. Total Requested Direct Costs</b>	<b>\$ -</b>
<b>F. Total In-kind</b>	<b>\$ -</b>
<b>G. Total UC Campus Costs in USD</b>	<b>\$ -</b>

<b>H. Total Other Partner Contribution - Canada (USD)</b>	<b>\$ -</b>
<b>I. Total Other Partner Contribution - US (USD)</b>	<b>\$ -</b>
<b>J. Total Requested Direct Costs (USD)</b>	<b>\$ -</b>
<b>K. Total In Kind (USD)</b>	<b>\$ -</b>
<b>L. Total Project Cost (USD)</b>	<b>\$ -</b>