



Oregon State University  
Foundation

# OFFICE OF FOUNDATION RELATIONS





# FOUNDATION RELATIONS TEAM

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# OSRAA-PROPOSAL AND AWARD MANAGEMENT

**Zach Gill**

**Director, Proposal and Award Management**

OSRAA supports “full lifecycle” grant assistance to Principal Investigators and staff. The Proposal and Award Management Team within OSRAA consists of teams providing dedicated support to colleges. Proposal review, award acceptance, award index set-up, award management (no cost extensions, rebudgets), and outgoing subaward questions should come to the Proposal and Award Management Team assigned to your unit.



# Budgets & Budget Narratives

**Faculty Grant Training**

January 18, 2019

## Agenda

### Developing Your Budget

Departmental  
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OSRAA Budget Review

Common Problems

Post-Award  
Implications

Budget Narratives

Tell the Story

Exercise

# Developing Your Budget

## STRATEGY

- 1.) List out everything you need to achieve the proposed activities
- 2.) Price out that list
- 3.) Make adjustments

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# Developing Your Budget

## CONSIDERATIONS

### Leverage vs. Cost Match

Leverage = what resources are you bringing with you to help on the project? OSRAA does not provide a financial report.

Cost Match = tell us the value of those resources in financial terms (e.g., put it in your budget). OSRAA provides a financial report.



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# Developing Your Budget

## CONSIDERATIONS

### F&A and OPE rates

Rate for your project is dependent on the type of project, the participants, the location, and the time of year. What is the sponsor's indirect costs policy?

### Time and Effort

Does the sponsor have time and effort reporting requirements?

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# OSRAA Resources

Most colleges and units have proposal resources for helping you develop your budget.

Proposal Award Management proposal reviewers (all at [proposals@oregonstate.edu](mailto:proposals@oregonstate.edu)):

**Michelle Warf**— float

**Lydia Perry**— CAS, CoF, Extension, HMSC, CIMRS

**Jenny James**— CoEd, CEOAS, CLA, CoPh, CoPHHS, CoS, CVM

**Robin Shumway**— CoB, CoE, Cascades, Grad School, all other units, RCRV project, Climate Science Center Program



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# OSRAA Budget Review

Before submitting to the sponsor, OSRAA will review your proposal budget. They are checking to make sure your budget complies with OSU policies and the stated policies of the sponsor. We request 3-day review period prior to sponsor deadline.

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# Common Problems

## UNDERCUTTING YOUR PROJECT

Your budget does not describe how all the proposed activities will be funded or underestimates how much those activities will cost.

### Why that's a problem

A reviewer may think your project is poorly designed or poorly conceived or that your inattention to detail is a red flag for the overall success of your project.

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# Common Problems

## NOT FOLLOWING INSTRUCTIONS

Your budget includes unallowable expenses, the request amount is too much or too little, or the project timeline is too long.

## Why that's a problem

Your proposal may be declined as ineligible or suffer other reviewer penalties.

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# Post-Award Implications

Your proposed budget submission has ripple effects after the grant has been awarded.

The proposal budget *determines the limitations and restrictions* on how grant funding can be expended when awarded.

OSRAA is responsible for managing compliance. Great variability in sponsor limitations on rebudget authority without prior approval.

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# Budget Narratives

Follow the instructions!

Is a budget narrative required? What are they asking you to include?

Each line item needs to be justified

Why have you included each item, why is each necessary? (Every item you skip is a reviewer's red flag.)

How did you arrive at the amount for each line?

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# Tell the Story

The budget and budget narrative are extensions of the proposal narrative.

Do the activities and outcomes described in the proposal narrative match the way you describe grant fund expenditures?

Are the sponsor's interests in how they like to fund projects represented? (Describes the sponsor's portion of the total project, and where/how the rest is funded.)

Is it **PERSUASIVE?**

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# Examples





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# QUESTIONS?

OSU FOUNDATION

Join us for the next grant training on  
**February 8**  
**Impacts and Broader Impacts**

Slides from this training session, previous sessions, and other proposal development tools at [osufoundation.org/training](https://osufoundation.org/training)