PennState
PennTAP
Pennsylvania Technical Assistance Program
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RISE PA Detailed Budget Form Instructions

1. Gather All Itemized Quotes

- Before completing the RISE PA SAT Detailed Budget Form, **collect all quote(s) associated with the proposed project**. All expenses entered on the budget form must be included in the itemized quote(s) submitted with the RISE PA SAT application.
- **Confirm that each quote(s) is itemized and states that labor costs for project construction/installation include prevailing wage rates.** Your selected contractor can provide guidance on prevailing wage rates for relevant job roles and project types.
- Identify any ineligible expenditures on the itemized quote(s). These costs cannot be reimbursed by the RISE PA program and should not be included on the Detailed Budget Form. If you have any questions about your project quotes or budget form, please contact the PennTAP RISE PA team at PennTAP_RISEPA@psu.edu.

2. Categorize Eligible Project Expenses

The RISE PA Detailed Budget Form separates eligible expenses into four categories (Items 1-4 on the Detailed Budget Form). Begin by looking at your itemized quote(s) and identifying which eligible expenses belong in each budget category. Do not include ineligible expenses on the Detailed Budget Form and in the Total Project Cost calculations in the Budget Summary Table.

- **Personnel** (Item 1) – Labor costs for installation or construction (must include prevailing wage).
- **Contractual** (Item 2) – Eligible services that are not physical labor for project construction/installation or purchased equipment/supplies. This may include project management costs, equipment rentals, etc.).
- **Equipment** (Item 3) – Eligible equipment purchases costing more than $5,000 per item.
- **Supplies** (Item 4) – Eligible supplies (e.g., materials, tools, or smaller equipment) costing less than $5,000 per item. Note that it is not required to differentiate Equipment versus Supply costs, if this is not possible based on the project quote.

3. Transfer Eligible Expenses to Budget Form

A reviewer of the RISE PA Detailed Budget Form should be able to understand how the itemized expenses listed on the project quote(s) have been translated into the budget form. All expenses listed in the budget form must be included in a quote. Begin completing the form by entering eligible expenses into the tables for Items 1-4 and Applicant Funds (Item 5). Completing the Budget Summary on Page 1 last.

1. **Personnel** (Item 1) – Transfer costs associated with labor for project construction/installation into the table. If your quote(s) provides the total cost of labor for construction/installation, please list this in a single row in Item 1 (e.g., electricians at prevailing wage rates) and enter the total cost for this labor in the Total Cost column. It is not required to list the position, hourly rate, hours, or benefits amounts. Expenses associated with project management, engineering expertise, or other professional personnel services should be included in the Contractual category (Item 2).
2. **Contractual** (Item 2) – Transfer costs associated with eligible contractual expenses into the table. Provide a description of the expense and whether costs have been incurred.
3. **Equipment** (Item 3) – Transfer costs associated with equipment expenses into the table. Provide a description of the expenses. If not possible based on your quote (e.g., all equipment and supply costs are combined into a single quoted price), it is not required to separate expenses into Equipment versus

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Supplies. In this case, add a description of the equipment in Item 3 (e.g., LED lighting package) and enter the price listed on the quote.

4. **Supplies** (Item 4) – If applicable (see above), transfer costs associated with eligible supplies into the table and provide a description.
5. **Applicant Funds** (Item 5) – Enter all sources of funding to be used by the applicant to cover the total project cost. This may include cash-on-hand, loans, lines of credit, other state/federal awards, etc. Indicate whether these funding sources are secured or unsecured. The amount entered should be equal to or greater than the total project cost listed in the Budget Summary. All sources of project funding should be stated in the financial commitment letter that will be included with your RISE PA SAT application. Note that the RISE PA SAT program is a reimbursement grant program, and awardees are required to fund 100% of the project up front. The 50% reimbursement of eligible expenses will occur following the completion of the project and the receipt by Penn State of all zero balance invoices.
6. **Budget Summary** (Page 1) – This table will show the eligible total project cost based on the expenses entered in Items 1-4, as well as the requested award amount (50% of the total project cost) and required demonstrated cost share (50% of the total project cost). Divide the total costs for **Personnel** (Item 1) and enter the amount into the corresponding Grant Request and Match Funds Columns. The total cost for Personnel should match in the Budget Summary and in Item 1. Continue the process for Items 2-4.
7. **Total Project Cost and Total Requested Grant Funds** – Check the total project cost and the total requested grant funds calculated in the Budget Summary. Check your math. Use these numbers for Total Project Cost and Requested Grant Amount on the RISE PA SAT application.

4. Helpful Tips

- Quotes that list only a lump sum and include no itemization should not be used on the RISE PA Detailed Budget Form.
- Confirm that your quoted labor expenses for project construction include prevailing wage rates.
- Be sure to provide corresponding quotes for all expenses listed on the budget form. If you are completing project construction in-house, prepare a quote on manufacturer's letterhead that outlines the cost for this labor (estimated number of hours, workers/roles, prevailing wage rates) and attach the quote with your RISE PA SAT application. The amount quoted should be listed in Personnel (Item 1) on the budget form.
- Do not make payments toward the proposed project or take receipt of any equipment without receiving written approval from the PennTAP RISE PA SAT team. Doing so will make the project ineligible for the RISE PA program. *The only exception to this rule is the making of a down payment to secure equipment*. Please submit with your application any invoices for down payments on equipment that have already been made and ensure that this invoice(s) states that the payment was for securing equipment for the proposed project.
- Have questions specific to your project? Connect with the PennTAP RISE PA team at PennTAP_RISEPA@psu.edu.