**Budget Checklist**

PI Professor Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Proposal Due Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Sponsor \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**General:**

1. What is the project type?

-Research, Instruction, or Public Service

1. Do you have a draft or an abstract of the proposal?
2. Have you uploaded the RFP? Is there anything in the RFP relating to the budget that seemed unclear or that you have questions about?

**Cost share:**

1. Any cost share required?
2. Third Party cost share?

**F&A, Indirect, Overhead:**

1. What is the F&A Rate?
2. Does the Sponsor limit F&A (Indirect costs)?

**RFP:**

1. Does the RFP have a funding limit?
2. Is there a limit to the number of years of funding?

**Other:**

1. Where will 2/3 of the project work take place?
2. Will this be a Modular budget?
3. Have you created a project timeline?
4. Is there anyone else you would like to include in the budget development meetings?

CO-PIs, Research Assistants, Other

1. Is this a training or workshop grant?

**Personnel:**

1. Who will be on this project? Any students? Other support staff?
   1. Are all PIs requesting salary?
   2. How many months/hours?
   3. Calendar Year/Academic Year/Summer?

**Student employees:**

1. Will you provide salary to graduate/undergraduate students?
2. How many students?
   1. What is the students’ degree level?
   2. Are you requesting salary? Cal/AY/Summer?
      1. What is the rate of pay?
      2. How many hours?
3. Are you requesting tuition and health insurance? In/out of state?

**In House:**

1. Will you have staff or post docs working on this project?
2. Will you have any employees?
   1. What is their rate of pay?
   2. Number of hours/FTE?

**Publication:**

1. Will you be publishing in journals prior to the end of this project? Include publications costs in later year’s budgets.

**Travel:**

1. Are you requesting any travel funds?
2. Will there be any RFP required travel?
3. Will there be any travel to Conferences?
   1. Will travel be domestic or foreign?
   2. Do you have any airfare estimates if appropriate?
   3. Number of trips/miles if local? Standard UI mileage or transportation pool/rural?
   4. Per diem/hotel?
4. Will there be any travel for non-UI people?

**Animal Work:**

1. Will you have animal costs?

**Human Subjects Work:**

1. Will you be doing survey or other work?

**Materials and Supplies:**

1. Any materials and supplies?
   1. Number of widgets x cost of widgets?

**Service/Consulting Agreements/Subcontracts:**

1. Will you need outside expert consultants to do part of the work? We will need to determine who they are now and determine if they are subcontractors instead of service/consulting agreements.
2. If any consultants (just a signed letter is needed) or if service agreement the following will be needed: Scope Of Work, Schedule of rates, Budget/justification, and Letter of Interest
3. If there are any subawards, the following will be needed: Scope Of Work, Schedule of rates, Budget/justification, and Letter of Interest

**Equipment:**

1. Are you planning to purchase any equipment over 5K? Do you have Documented Quotes?
2. Are you having anything fabricated or built especially for this project?

**Odd-ball expenses:**

1. Will you require access to specialized databases, etc?
2. Will you be providing participant support (training/subsistence/travel to other than UI participants at project workshops)?
3. Do you expect to generate any program income?
4. Will you have any other specific costs that have not already been covered?

\*Special thanks to Heather Nelson, Office of Sponsored Programs