

BUDGET JUSTIFICATION HELP

<https://www.bradley.edu/offices/business/financial-services/policies-procedures/funds/budget-template.dot>

BUDGET JUSTIFICATION CATEGORY	DESCRIPTION	TIPS
PERSONNEL	<p>Only Bradley University employees should be listed under Personnel.</p> <p>PI: Dr. X (a 9-month academic year employee) will provide scientific direction and supervision for the project [including...]. # summer months are requested for each of the three project years. The monthly rate is calculated as 1/9th of PI's annual salary of \$\$\$. A ___% increase is budgeted in project years 2 and 3.</p>	<p>Senior Personnel includes PI(s), Co-PI(s). List his or her name, title, the amount of time he or she will spend working on the project, and what he or she will be trying to accomplish.</p>
A. SENIOR PERSONNEL	<p>Co-PI: As Co-PI, Dr. Y (a 9-month academic year employee) will be responsible for [...]. One summer month is requested for project year 1; one half-summer month is requested in each of project years 2 and 3. The monthly rate is calculated as 1/9th of the Co-PI's annual academic year salary of \$\$\$. A ___% increase is budgeted in project years 2 and 3.</p>	<p>Avoid saying anything like "Person X will work Y amount of time at no cost to the sponsor", because that is considered cost sharing. Bradley University doesn't allow cost sharing unless the sponsor requires it in writing.</p>
B. OTHER PERSONNEL	<p>Other Personnel includes post-docs, research assistants, lab techs, graduate students, undergraduate students, etc.</p> <p><i>Research Associate:</i> Dr. Z will serve as the Research Associate responsible for [...]. One month (8.3% effort) is requested for each of the three project years. The monthly rate is calculated as 1/12th of the Research Associate's annual calendar year salary of \$\$\$. A ___% increase is budgeted in project years 2 and 3.</p>	<p>For Other Professionals: List name, title, the amount of time he or she will spend working on the project, and what he or she will be trying to accomplish.</p>
1. OTHER PROFESSIONALS	<p><i>Post-Doc:</i> To be hired. 12 months (100% effort) are requested for each of the three project years. The Post-Doc will be responsible for [...]. The monthly rate is calculated as 1/12th of the Post-Doc's annual calendar year salary of \$\$\$. A ___% increase is budgeted in project years 2 and 3.</p>	

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2. GRADUATE STUDENTS	Funds are requested in the amount of \$\$/month for # months for # graduate students during each of the three project years. These (masters/PhD-level) students will be responsible for [...].	For students, identify their level (PhD, masters, or undergrad) and rate of pay. Rates of pay vary depending on discipline, skill level, etc.
3. UNDERGRADUATE STUDENTS	Funds are requested for an undergraduate student to aid the graduate students in [...]. The undergraduate student will work # of hours/week for # of weeks during each of the three project years.	For students, identify their level (PhD, masters, or undergrad) and rate of pay. Rates of pay vary depending on discipline, skill level, etc.
FRINGE BENEFITS	Fringe benefits are <u>not</u> charged on student salaries.	Fringe benefits are calculated at a rate of 25% of salaries for all full-time senior personnel, research associates, and post-docs. A 10% fringe Benefit rate is used for part-time employees and extra compensation/summer and winter interims for full-time employees.
PERMANENT EQUIPMENT	Equipment is defined as a single item, a multiple purchase “system” or a “fabrication” with a useful life of more than one year and a unit cost of at least \$5,000 unless. Bradley University <u>capitalization threshold is \$5,000.</u> A “system” can be made up of many items that must interact with each other and, when added up, total \$1,000 or more. A fabrication is just like a system except it cannot provide useful results right away. Please attach	We plan to purchase [equipment name/detail] in year 1 in order to [...]. The cost is \$\$, which includes shipping and setup.

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TRAVEL	<p>a quote or catalog description with pricing included (for internal purposes only).</p> <p><i>Domestic Travel:</i> The PI, Research Associate, and one graduate student will attend the National Association Conference in project years 2 and 3 to present results. Meeting cities are not yet set. Airfare is estimated at \$\$ per person per trip. Lodging and meals are estimated at \$\$ a day per person for # of days. Registration fees for the graduate student are \$\$.</p> <p><i>Domestic Travel:</i> The graduate students will travel across the state to collect data. Mileage is \$\$/mile. The students will travel approximately # miles per year for three years.</p> <p><i>International Travel:</i> In project year 1, the PI and Co-PI will travel to COUNTRY to [...]. Airfare is estimated at \$\$ per person. Lodging and per diem are \$\$ a day per person for # of days.</p>	<p>List “who, what, where, when, and why”. All Bradley University regulations must be followed. Please refer to the University Travel and Expense Reimbursement Policy.</p>
PARTICIPANT SUPPORT COSTS	<p>Ten high school teachers will be trained by the PI for a total of ten days over the project period (one Saturday per month for 10 months). They will be trained on [...]. Each teacher will receive a \$\$ stipend. Travel is estimated at \$\$ per teacher.</p>	<p>Participant Support Costs refers to the costs of stipends, transportation, per diem, and any other costs associated with participants or trainees attending proposed conferences, meetings, workshops, or trainings. These costs are not for employees of Bradley University.</p>
SUBAWARDS/SUBCONTRACTS	<p>State University will carry out the ABC test and design. \$\$ is budgeted each year for [cost elements]. (<i>A separate budget and justification is included.</i>) City College will design and</p>	<p>List subaward institution and a short description of the aspect of the project they will perform.</p>

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	build the system starting in year two, and is expected to need \$\$ per year for [cost elements]. <i>(A separate budget and justification is included.)</i>	Bradley University also <u>requires</u> a separate statement of work, budget, budget justification, negotiated fringe and overhead rate agreement, and an authorized signature of approval from the subaward institution.
OTHER DIRECT COSTS		
1. MATERIALS AND SUPPLIES	<p><i>Computer Software:</i> The Necessary Software Package will be purchased in order to [...]. The packages will be purchased at \$\$ each. <i>Laboratory Supplies:</i> Glassware and plastic ware, as well as chemicals, will be purchased in order to [...]. Estimated costs of each item are: \$\$.</p>	<p>Remember—costs can only be charged directly to a grant if they can be readily and specifically identified with that particular project.</p> <p>So, always be as specific as possible. List types of purchases, estimated costs per year and, especially, why purchases are essential to and dedicated to the research on this project.</p>
2. PUBLICATIONS COSTS/DOCUMENTATION/DISSEMINATION	Funds are requested for page charges. These costs are estimated based on the publication rate of the PI over the past year and are budgeted for years 2 and 3 only.	
3. CONSULTANT SERVICES	Mr. B. Business of Business Company will consult with project personnel throughout the project period. In each year of the project, he will travel to the university # times per year to [...]. Travel costs include \$\$ for lodging, per diem, and air fare. Mr. Business's compensation rate is \$\$/day for a total of # days/year.	Consultants are any non-Bradley University professionals who do not contribute to the overall programmatic effort of the project. The description must include who they are (if known), rate of pay

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TUITION	<p>Tuition is requested for # semesters for # of graduate students for each project year. Current tuition fees are \$\$/semester*. An estimated 5% increase is budgeted in years 2 and 3.</p>	<p>(and how this was determined), work to be done, and timeframe of hire.</p> <p>For current tuition rates, please visit the Student Financial website.</p>
OTHER	<p>Use the "Other" category for any other cost element that does not fall into an established cost category.</p>	
INDIRECT COSTS	<p>The indirect costs are calculated as 53% of direct labor (excluding fringe benefits). Bradley University's indirect cost rate is federally negotiated with DHHS.</p>	<p>Indirect Cost rates are also called Facilities and Administrative rates (F&A) or overhead rates. These rates are negotiated with the federal government on a periodic basis. Indirect cost rates are meant to recover all of the "hidden" costs of doing research like building, utility and maintenance costs, and administrative costs (e.g. the costs of purchasing and research offices).</p> <p>Unless sponsor has a published limit, use the indirect rate established in Bradley University's current indirect cost agreement.</p> <p>If rate is limited by sponsor, be sure to provide the rate and the base (for example, 25% salaries, wages,</p>

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		and fringe; or 8% total direct costs). Documentation of the sponsor's restricted indirect cost limitation is required.