PI/Pre-Award DRA Checklist for Proposal Budget Creation

This checklist will facilitate a discussion between the PI and Pre-Award DRA to set expectations and deadlines during the initial stages of proposal budget preparation.

### Proposal Budget Summary

- Title of Project:
- Name of Sponsor:
- Solicitation Number (RFA, RFP):
- Sponsor's Guidelines or Application
- Date proposal is due to SPA:
- Date budget must be finalized:
- Project dates (list start and end dates, and budget periods):
- Type of project (e.g. grant, contract):
- Type of proposal (e.g. research, instruction):
- Method/type of budget (e.g. standard, modular):
- Will an inflationary rate be used (if yes, specify the rate)?
- Is cost sharing involved? Is it mandatory?
- Are there any subawards?
- Are there any Co-Is that are in other departments/colleges?
- Will program income be generated? If so, describe and list amount.
- Who is responsible for creating the budget and what are their roles?
- Other (specify):
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Common Budget Category Key Considerations

1. Personnel: provide the following information for each individual:
   - Name, payroll title, and role on the project.
   - Job code
   - Appointment term (e.g. 12-month, 9-month)
   - Full Time Equivalent (e.g. 100%, 50%)
   - Annual/institutional base salary
   - Percentage of time (effort) to be spent on the project

   - Amount to be charged to the project
   - Amount to be cost shared by the department (if applicable)
   - Fringe rate(s)
   - Will there be annual increases or an inflationary rate used? If yes, specify.
   - Sponsor restrictions (e.g. NIH salary cap)? If yes, specify.

2. Consultant and Professional Services Costs

3. Equipment

4. Materials and Supplies

5. Travel

6. Subaward/Subcontract Costs
   - List the name of the organization and primary contact person
   - Obtain the subaward’s detailed budget
   - Determine a deadline for the subaward to submit the budget to the PI/department

7. Renovations and Alterations

8. Patient Care Costs

9. Other Direct Costs and Services

10. F&A Costs
    - Determine which rate will be used
    - List any budget items that are F&A exempt

11. Other budget considerations (please specify):

Budget Justification

- All budget justifications must include:
  - item names,
  - description of cost,
  - calculation of costs,
  - and the statement of why cost is necessary for the project.