

Budget Checklist  
(*sample budget and budget justification attached*)

Personnel

- Are salary figures current and accurate?
- Do salary figures incorporate anticipated COLA on the correct anniversary date for each project employee?
- Do salary figures incorporate anticipated promotions, hires and/or changes in roles?
- Are correct fringe rates used for the time periods covered?
- Is each salary or fringe change on a separate line?
- Does the budget outline the correct number of months per year for each project employee?
- Does the budget outline the correct percentage of effort for each project employee?
- Have you budgeted for student interns and their mentoring?
- Have you budgeted for part-time student employees?
- For project employees working less than a full year, does the budget indicate the month of the project in which each of those employees will begin and the number of months each employee will be working?
- Are the following Center-wide administrative costs included (about 15% of direct costs):
  - Chief Financial Officer
  - Fiscal Coordinator
  - HR/Administrative Coordinator
  - Administrative Assistant for the Center
- Are there additional administrative costs specific to your project that need to be included?
- Have you budgeted sufficient personnel, including research assistants, trainers and/or other staff as needed, in order to complete the project in a timely manner?
- Have you budgeted accurately for Research and Evaluation personnel efforts, including file set-up, data entry, data cleanup and data analysis?
- Have you budgeted accurately for Program Development personnel efforts, including pilot testing, trainings, and other developmental activities?
- Are other consultative core personnel efforts included accurately as needed?
- If this is a multiyear project, is inflation built into all personnel costs after the first year, based on federal COLA or other anticipated increases?

## Other Than Personnel

- ❑ Have you budgeted accurately for Research and Evaluation materials, including tests, questionnaires and other related costs?
- ❑ Have you budgeted accurately for Program Development materials, including manuals, graphics, brochures, flyers, posters, audiovisuals and other related costs?
- ❑ Does the budget include accurate equipment costs, including but not limited to costs for computer equipment, upgrades or software?
- ❑ Does the budget include an accurate amount for office and other supplies, based on averages for similar projects?
- ❑ Are recurring costs for off-site locations included (e.g., telephone and utilities)?
- ❑ Are copying and printing costs included?
- ❑ Have you budgeted for books, subscriptions and other informational materials?
- ❑ Does the budget include an accurate amount for other materials and services, based on averages for similar projects?
- ❑ Are any special costs (e.g., leasing field space) accurately accounted?
- ❑ If you are dealing with clients, have you budgeted for:
  - ❑ refreshments/food
  - ❑ participant fees
  - ❑ local travel
  - ❑ tracking or recruitment costs
  - ❑ brochures, flyers, etc.
- ❑ If you are producing curricula, have you budgeted for:
  - ❑ program development costs (i.e., consultants, translations, elicitation research, client acceptability, graphics)
  - ❑ production and reproduction costs
- ❑ If you will be presenting at a conference, have you built in:
  - ❑ audiovisual and poster production costs
  - ❑ conference and registration fees
  - ❑ travel
  - ❑ consultation on writing and communications
- ❑ Have you budgeted adequately for staff training?

### Contractors/Subcontractors

- ❑ Have you budgeted for the external consultants necessary to complete your project?
- ❑ Are subcontractor costs, if any, included and accurate?
- ❑ Is the subcontractor indirect cost allowance accurately budgeted?
- ❑ Does the subcontractor budget meet all the requirements mentioned in this list regarding salaries, supplies, etc.?

### Indirect Costs

- ❑ Is the correct indirect cost rate used? (Use the federally approved rate unless otherwise specified; use the maximum allowable rate for other funders.)
- ❑ If the indirect cost rate allowed is less than 20%, have you built additional costs into the budget for administrative staff and supplies?

### General Fiscal

- ❑ Do budget numbers add up?
- ❑ If this is a multiyear project, are funds carried over from the previous year(s) accurately?
- ❑ Have you accounted for all financial aspects of the application?
- ❑ Does the budget match the budget justification?
- ❑ Have you met with the CFO to design the budget?
- ❑ Has the CFO signed off on the budget?