

Tips on creating a budget for a research grant proposal

A budget is created using your best educated guesses for expenses during the course of the project. It is often divided into different categories (e.g. direct costs, administrative, consumables; knowledge translation, research management, evaluation, research staff, etc.). Often the funding agency supplies a template.

Here are some common categories with some assistance on how to calculate.

Salaries and wages

1. Research Assistants

All Research Assistants will have to be hired according to the Public Service Alliance of Canada (PSAC) agreement. A link to wages and classifications (as of September 1, 2014), can be found here: <http://www.brandonu.ca/science/psac-wages-and-classifications/>

Add 17% for vacation pay and payroll costs (E.I., CPP, WCB, etc.). Note: I have been told by Human Resources to include 17% for payroll costs, but the BURC application actually has the percentage at 18.

Some general guidelines:

Literature searches – This will vary dependent on the amount of literature available on the subject under investigation. My RAs have been completing literature searches in anywhere from 2-6 hours. This is not the review, but rather just the search.

Transcription – a general guideline is 3 hours of transcription for every hour of interview.

2. Research Coordinator

Some grants allow for the researcher to hire a project coordinator. For this, you will have to use your best guess of how much time the coordinator will be contributing to the project. Consider time for arranging meetings, doing minutes, coordinating interviews, establishing guidelines, promotion, etc.

It is easier if you can hire the Coordinator through the PSAC agreement. If you have a coordinator that you would like to hire outside of the PSAC agreement, you probably need to have a discussion with Human Resources on the best way to accomplish that.

Administration

1. Research Contract and Overhead Policy

When a grant is sought from an external agency **AND** the external funder allows for overhead or an administrative fee to be charged, you must include:

Standard Rate: 30% of direct costs

Contracts less than \$10,000: It is more appropriate to levy an administration fee of 10% rather than the full overhead rate

In exceptional circumstances, the Vice-President (Academic & Provost) has the authority to negotiate the amount of overhead charged.

See: <http://www.brandonu.ca/research/files/OverheadPolicy.pdf>

Travel expenses

Consult the BUFA Collective Agreement for current rates for mileage and meals. As of this collective agreement (ends March 2015) the rates are: \$50.00 per day or \$10.00 breakfast, \$15.00 lunch, \$25.00 supper for travel within the Province of Manitoba; or \$55.00 per day (\$11.00 breakfast, \$17.00 lunch, \$27.00 supper) for travel outside the province and at current CIDA rates for travel outside of Canada.

The link to the collective agreement can be found at:

<http://www.brandonu.ca/hr/>

Consumable supplies

These refer to supplies that are used up during the course of the project. This would refer to the costs of photocopying, printing, pencils, pens, pads of paper, markers, postage, computer supplies, etc. This is where the best guess comes in, but often consumables are one of the lower priced items in the budget.

Equipment

Equipment could include recorders for recording interviews, transcribing equipment, computers, etc. There may be unique costs for the project as well such as iPads to allow researchers to collect survey information on site or upgrade of telephones to allow for hands free calling and a headset.

Methodology expense

Consider whether you need to hire external support for analysis, such as SPSS or NVivo. The Manitoba Centre for Nursing and Health Research offers both statistical consultation and set up, data entry, and analysis for SPSS.

Rates can be found at:

http://umanitoba.ca/faculties/nursing/mcnhr/media/Charge_out_rates_2014.pdf

Both SPSS and NVIVO can be set up on the BU computers at no extra charge to the researcher (if a license is available – there are a limited number of licenses. Go through IT to find out if a license is available).

NVIVO has an online tutorial for \$295.00. There are two programs – NVivo Essentials and Further Analysis in NVivo. They also offer online consultation. You must contact them to determine costs for online consultation. However, there are numerous YouTube videos to assist with using NVivo. Also, we have a number of researchers across campus that have expertise and may be able to assist.

Knowledge translation

Consider expenses such as space, refreshments, design and printing of materials, costs of travel to conferences, costs of materials for posters, etc.

Here is a link to the BU catering form:

<http://www.brandonu.ca/food-services/catering/>

Two places that have provided good service for the printing of promotional material (e.g. posters, postcards, buckslips, etc.) have been:

The UPS Store #396
Owned and operated by Leah Taylor
Keystone Village, 100 - 1300 18th St
Brandon Manitoba, R7A 6X7
PH: (204) 728-9494
FAX: (204) 725-4084
Email: store396@theupsstore.ca

Innovative Media and Marketing (formerly IMG)
A subsidiary of Leech Printing
601 Braecrest Drive
Brandon, MB
R7C 1B1
PH: 204-571-4500
Email: design@weareinnovative.ca

Examples of costs:

IMM charges \$75/hour for design and there is often a cost for images purchased from a photo bank.

During Healthy Campus, UPS did all of the creative design and printing at a very reasonable rate. For example: a 250 postcards size 4.25" *5.5" with colour both sides would be \$0.38 each; 8.5"*11" posters full colour would be \$0.44 each. Graphic design is \$75.00 per hour. Typical postcard or brochure design is between 15 minutes and 45 minutes.

Brandon University also provides printing services, however they do not list their prices. On request, I learned that the cost for colour printing 1 side is \$0.40 per page and both sides is \$0.55. The cost for black & white is \$0.05 cents per 1 sided page or \$0.08 cents for both sides.

The IT department will print oversize posters (Dr. Care's poster in the main hallway on the main floor of HSB was printed by the Print Shop). IT charges \$25.00 - \$30.00 for oversize poster printing.

Other

Sometimes gifts or incentives need to be included within the budget. For example, a draw prize when the participants complete a survey. On First Nations communities it is customary to provide a gift to the elders. There may be other situations when a gift is appropriate.

In kind

Be sure to incorporate all of things that you or the institution will include without a cost to the project. This can include space, faculty/staff time, equipment, software, etc.

General tips

1. **Use the requests for proposals template provided with the call.** If the RFP has a budget template, use those categories. Do not create other categories.
2. **Do not go over the allotted grant amount.** If you do go over the allotted grant amount, be sure to explain that you only want their grant allocation and that you will be seeking funding for the surplus or that you have already received funding for the surplus.
3. **Review the call for exclusions to the budget.** Some RFPs do not allow you to budget for personnel; others do not allow for an overhead fee. Read very carefully and make sure you do not include anything in the budget that is disallowed. Ask the funder for clarification if unsure.
4. **Be reasonable.** Do not over-estimate the budget, but be careful to not underfund as well.
5. **Check and re-check your calculations.** Use a calculator. Once you think all the numbers add up, check one more time. Proposals have been known to get thrown out just because of a simple adding error.
6. **Be prepared to justify your budget.** Many RFPs ask for a detailed justification of the budget. If you keep a worksheet on how you came to the final figure, you can use this to assist in justifying your budget.
7. **Share your budget with a colleague.** Having a colleague check over your budget may help you to distinguish inconsistencies or areas of your budget that are not clear. Chances are if your colleague has questions about the budget, the funder may too.