

Sam Houston State University
Office of Research & Special Programs
Budget Worksheet Guidelines

The budget worksheet is designed to assist faculty and professional with developing a complete detailed budget for external funding opportunities. Please complete this budget worksheet to provide an overall estimate of the total cost of the project that will facilitate carrying out the statement of work for the proposed research. The investigator should neither overestimate the funds required nor underestimate budgetary needs. Either of these strategies may lead to proposal rejection. A budget, accurately detailing the funds necessary to carry out the technical statement of the work, can strengthen the total proposal and increase the likelihood of funding.

Provide the following information.

- Funding Period: Beginning and Ending of Project
- A. Senior Personnel (Indicate the % of time to be devoted to project for the PI and CO-PI)
 - a. Principal Investigator Names
 - b. Co-Principal Investigator Names

Other Personnel (Indicate the % of time to be devoted to project for other personnel and the Monthly/Hourly Rate to be paid)

- c. Research Associate
- d. Other Professional Name
- e. Graduate Student Name
- f. Undergraduate Student Name

Note: All SHSU employees (faculty, staff, and students) must be listed under Personnel for salary, wages, and fringe.

- B. Travel: Estimate the dollar amount for travel for each year which includes airfare, ground transportation, lodging, mileage, parking, per diem rate, and conference/registration fees
- C. Capital Equipment: Name any single piece of equipment \geq \$5,000 for each year
- D. Materials & Supplies: Estimate dollar amount for materials & supplies for each year.
- E. Other Expenses: Estimate dollar amount other expenses for each year.
Note: Compensation for ALL Non SHSU individuals, (i.e. consultants, evaluators, and trainers) must be budgeted under other expenses with any associated travel expenses
- F. Sub-contractual: Provide the name of the subcontracts/sub-recipients and the estimated dollar amount for each year. Note: Before the final submission of the proposal, subcontractors must submit a detailed budget, and a budget justification narrative.
- G. Facilities & Administrative Costs

The federally negotiate F&A rate is 39% of salary, wages, and fringe benefits. The off campus rate is 17%.
- H. Total Costs
 - a. Indicate sponsor's annual limit or total amount that PI does not want to exceed for each year.
- I. Matching Funds (Indicate only if required)
 - a. If the sponsor requires matching funds, please provide the % of matching funds required for the total direct costs that should be calculated as matching funds.

Following completion of the budget worksheet, contact Angela Fazarro @ 4-4862 or afazarro@shsu.edu for developing a comprehensive detailed budget.