Grant Budget Assistance

Budget Assistance Timeline

	Deliverable	Descriptions and Responsibilities	Delivery Method	Frequency	Expected Time Frame	Involvement
Week One	**Initial Meeting**	The PI contacts GBA unit to meet and discuss budget ideas. From this meeting, the PI and GBA staff member will plan the next action steps and a general timeline for budget completion.	In person	As needed	1-2 days	PI
Assembling Budget Components	**Review of Agency's Guidelines**	The PI and GBA staff member both review the guidelines to determine if there are any factors that could affect the budget. This could include factors such as a limit on the amount that can be requested, required institutional cost share, or a restriction on F&A costs.	E-mail, phone, or in person	As needed	1-2 days	GBA and PI
	Working Draft	The PI provides the salary and wage details (by name, if possible), any estimated materials, supplies, travel, vendor quotes/other documentation for equipment costs, and any other direct costs. The PI will provide these budget details to the GBA staff member. If travel itinerary details are available, the GBA staff member can verify the domestic and/or foreign per diem rates. The PI will be responsible for determining her/his estimated airfare costs and if a rental car should be used for applicable travel situations.	E-mail, phone, or in person	As needed	4-5 days	PI
	Verification and Validation	The GBA staff member reviews the budget against agency guidelines, institutional policy, and verifies all salaries (excluding undergraduate and graduate students). Any suggested adjustments to the budget are communicated to the PI. The GBA staff member will not make any budgetary adjustments without notifying and receiving approval from the PI.	E-mail	Daily	2-3 days	GBA and PI

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Week Two	**Review Strategy**	The PI and GBA staff member will review the working draft of the budget, communicate any questions, and discuss the next action steps.	Phone or in person	Weekly	5-7 days	GBA and PI
Reviewing and Revising the Budget	**Additional Details**	The PI provides the current budget justification and any subaward budgets and justifications. Additional information, such as third party cost-share documentation and/or subaward or service agreement determinations, will also be reviewed by a GBA staff member.	E-mail	As needed	1-2 days	GBA and PI
	GBA Unit Revisions	The GBA staff member compares the provided information to the working draft of the budget to determine if any inconsistencies exist. The GBA staff member communicates the suggested adjustments to these documents to the PI, as needed. If there are any areas of concern, the GBA staff member will contact the PI prior to making any revisions or adjustments to the budget.	E-mail	Daily	1-2 days	GBA

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Week Three	**Follow-Up Meeting**	The GBA staff member reviews the final version of the budget, budget justification, and any subaward budgets and sends any suggested revisions/comments to the PI.	E-mail	As needed	1-2 days	GBA
Finalizing the Budget	**Minor Adjustments**	The PI reviews the final version of all relevant budget documents. If any minor revisions are needed, the PI will work with the GBA staff member to make any necessary budget adjustments.	E-mail, phone, or in person	As needed	1-2 days	GBA and PI
	Submission to Pre-Award	The final budget(s) and budget justification(s) should be in compliance with the guidelines. The entire proposal will be ready for submission to OSP Pre-Award for review.	Campus Mail, in person, or electronically through the EBS system	Not applicable	Preferably, at least 5 full business days prior to the sponsor's submission deadline	PI