BUDGET GUIDELINES

CBIS OGILVY RESEARCH FELLOWSHIP AND CONFERENCE TRAVEL GRANT APPLICATIONS

The budget is an important component of each application. A detailed, well researched budget reduces the risk that you may find yourself having to pay unanticipated expenses out of pocket. It also demonstrates to the awarding committee that you have planned carefully, have realistic expectations, and are thus more likely than not to meet your goals.

General Guidelines

1. Itemize all anticipated expenses.

2. Only list legitimate expenses, i.e., expenses necessary to complete the project described in your application. Expenses vary depending on one's destination(s) and the purpose of one's travels, but usually include some of the following:

    a) Airfare
    b) Local transportation (travel to and from airports; local buses, trains, cars, etc.)
    c) Visa fees
    d) Health Insurance
    e) Immunizations
    f) Conference registration
    g) Accommodation/ Housing (including utilities, if relevant)
    h) Food (including bottled water, if necessary)
    i) Fees (to access libraries or museums, for instance)
    j) Internet access / phone costs (for foreign travel)

3. Factor in taxes and exchange rates (if applicable).

4. Annotate your budget. Do not just mention dollar amounts. Provide explanatory details and justifications for each budget line, as needed. Err on the side of providing too much rather than too little information.

5. Do *not* rely on the *per diem* figures for accommodation, meals, and incidentals provided on US government websites for the domestic and international travel of government employees. ***Aim instead to minimize costs without sacrificing safety***. Other CU students

who have traveled recently to your destination may be good sources of advice on how to calculate costs. Your faculty adviser may also be a good source of information. In addition, you may use the following site as a rough starting point: https://www.expatistan.com/cost-of-living/city.

6. Do not aim for the highest possible award amount and then produce numbers that just happen to add up to that amount.

Specific Guidelines

Expense categories vary from one project to the next, so there is no standard budget form. Instead, format your budget in a way that suits your needs. (You can find samples budgets under "Resources" below. Also, note that you can save Xcel spreadsheets as pdfs.)

Aim for clarity and thoroughness.

Whatever method/format you choose, be sure to do the following:

1. Include exact dates (even though these may change) and locations.

2. Provide amounts in US dollars and in the local currency (where relevant). You can find a currency converter at https://www.oanda.com/currency-converter/en/?from=EUR&to=USD&amount=1.

3. Mention your source(s) for each expense (airline, hotel, Airbnb, local transportation system, or archive website, for instance).

4. Air Travel:
   o List all flights.
   o Indicate departure and arrival airports and the name of the carrier(s). (Note: you must choose a US Flag Carrier for every leg of your trip whenever possible; if you select a non-US carrier, explain why.)
   o Justify how you came up with the airfares listed:
      ▪ Use the search function in Concur Travel, the University's online booking tool. It is accessible via the MyCUInfo portal (click on CU Resources and then on Concur Travel & Expense system).
      ▪ If you have trouble accessing Concur Travel, use one or more other sources, or explain that you have calculated an average dollar amount by considering various possible dates and consulting websites x, y, and z.
   o Do *not* purchase any air travel before you hear whether you have been awarded a grant. The university has specific travel guidelines (linked below under Resources) you will need to adhere to, especially in the case of international travel. In particular, you will need to use Concur Travel, the University's online booking tool and

Christopherson Business Travel, the University's contracted travel agency, to book flights. Award letters will provide detailed instructions.

5. Accommodation:
   o Identify reasonably priced but *safe* housing.
   o List exact dates, the number of nights for each stop, and the expected cost(s). (The dates and durations of stays may change; give your best guesses.)
   o In the case of London stays, please indicate whether you have applied for the use of the [Hazel Barnes Flat](#) and note the result of your application or by what date you expect to be notified.

6. Food:
   o Do not limit yourself to bread and water, but do not expect to eat every meal in a restaurant either.
   o Produce a realistic budget for each location and dates. (You may break meal costs down into weekly rather than daily amounts for longer stays in the same location.)

Resources

- The travel guidelines of the University of Colorado Boulder: https://www.cu.edu/psc/travel (for informational purpose only; do not act on these before you hear about the results of you application)

- The Travel Advisory Map of the U.S. Department of State: https://travelmaps.state.gov/TSGMap/

- Websites on creating a budget for a grant/fellowship application:
   o https://funding.yale.edu/prepare-apply/creating-budget (includes examples of appropriate and problematic budgets)
   o https://uraf.harvard.edu/apply-opportunities/app-components
   o https://cseas.yale.edu/sites/default/files/files/CIPE_PreparingBudget-2.pdf