

# Budget Guidance

*Last updated: 3<sup>rd</sup> February 2022*

This commissioning call is open to all disability groups, practitioners, researchers, higher education institutions, International Organisations etc. whose key intended beneficiaries are persons with disabilities and their families in Lebanon, Jordan and occupied Palestine territories.

If you would like further guidance on the completing the budget process. please email us at [disabilityundersiege@contacts.bham.ac.uk](mailto:disabilityundersiege@contacts.bham.ac.uk)

## Budget Information

Up to a maximum of £30,000 can be applied for under the Network and Knowledge Exchange Funding Call.

Funds will be drawn from an overall funding pot of £150,000 with an expected 5-8 projects awarded grants.

There is no minimum amount for an application. However, applicants should consider the administrative burden of delivering a relatively small funding amount.

## Overseas Development Assistance (ODA) Funding Requirements.

As the funds being made available are allocated as ODA funds organisations in countries on the [OECD DAC List of ODA recipients](#) (except China, India, or countries due to graduate from the list) will receive funding to cover the full costs of the project (100%). Organisations in the UK will receive funding in accordance with [standard procedures for UK Research and Innovation \(UKRI\) grants](#), in other words 80% of full economic cost, with the recipient organisation required to cover the balance.

## Budget Eligibility Criteria

An eligible budget must meet the following criteria:

- At least 50% of the full economic cost of the project **must** be allocated to Middle East (Jordan, oPT and Lebanon) countries involved to meet UK Overseas Development Aid requirements for direct benefit.
- Your budget must be in Great British Pounds (GBP). When converting currency, please use <https://www1.oanda.com/currency/converter/>
- No more than 25% of the budget will be used to purchase equipment
- Organisations in Jordan, oPt and Lebanon can request up to 20% of overheads costs on staff costs, these must be part of the total requested budget, UK overheads will be worked out in accordance with UKRI rules
- All of the activities will take place within the project dates, for example a flight cannot take place after the project finishes even if the ticket is purchased before the end date
- All expenses should be good value for money, standard class public transport and economy air travel
- It will include all costs of outputs, for example translation costs
- All expenditure mentioned throughout the application will be accounted for, if these are being covered elsewhere, this will be outlined in the budget justification
- Capital or infrastructure expenditure (e.g. basic office/laboratory/accommodation furniture or equipment, building/site construction, maintenance or refurbishment work, etc.) is not an eligible



cost under this call although additional costs incurred by existing facilities or infrastructures relating to their use as a part of the research or in the archiving of project- specific research data/outputs may be considered.

#### What costs can be covered?

- Funding to cover the time that Principal and Co-Investigators commit to the project (Research and Engagement Fund)
- Employment of a Research Assistant to help with the research (Research and Engagement Fund)
- Staff time/administration costs/expert consultancy
- Travel, subsistence and consumables related to the research/project activity and its direct participants
- For events or performance-related activities eg venue hire, refreshments, printing, translation and interpretation costs
- Visual and performative artistic tools needed for collaboration in the funded project (i.e., materials for art related projects).
- Data and Digital Technology Costs
- Workshop or training fees
- Indirect costs (overheads) associated with the project (maximum 20% of total award).

#### What costs cannot be covered?

- Capital or infrastructure expenditure (e.g., basic office/ laboratory / accommodation furniture or equipment, building/ site construction, maintenance or refurbishment work, improvements to digital connective infrastructure, etc.)
- Where possible accessible venues and facilities should be selected; please note that infrastructure costs cannot be requested for example to make structural alterations to venues for improved accessibility.
- Fees for undergraduate or postgraduate courses
- Costs for activities already outlined in the original grant proposal
- Activities that show no clear connection to the applicant's original proposal
- First class travel costs or priority visa fees
- Trips which show no real outputs for professional development
- Applications made on behalf of applicants without the applicants' agreement
- Costs for activities that don't adhere to [ODA Compliance](#)
- Any activities that undermine the goal of human rights for all
- Any activities that involve the tobacco industry
- Institutional indirect costs cannot be claimed by those out with DAC listed countries
- equipment purchases under £10,000 should only be considered where significant use of equipment is required specifically and primarily or solely for the proposed research activity and/or where this is more Please be advised that if your project is chosen for funding that you will be required to evidence the above through the provision of appropriate policies, procedures and audited financial statements. For any additional guidance please contact us at [disabilityundersiege@contacts.bham.ac.uk](mailto:disabilityundersiege@contacts.bham.ac.uk).

#### Financial Stability

In order to ensure the greatest chance of success for the project the Lead Organisation applying for funds should be able to:



- demonstrate that they are financially stable and have robust assurance around managing and accounting for grant funding;
- have a bank account that is in its legal name and that can be reconciled to the appropriate finance management system;
- have a basic finance management system that can be used to reconcile the bank account, to record all cash and payments ensuring that all transactions can be individually identified and provides suitable storage for supporting documentation;
- have satisfactory procedures in place for making payments for per diem, travel advances or review of receipts and subsequent reimbursement of expenses for approved official travel.

### Budget Formats

- All budgets should be completed using £GBP. If your budget planning occurs in a local currency or USD please use the latest exchange rates to convert to £GBP. A reliable source can be found here: <https://www1.oanda.com/currency/converter/>.

Depending upon if you are applying in the UK or international you will be asked in the Application Form to complete a different budget. Please delete, or leave blank the budget template you are NOT utilising. You may make additional headings in the budget tables where necessary to provide more detailed information.

**Table A: For International Applicants**

Fund Heading	Cost (£)	Justification
<b>Staff Costs</b>		
Principal Investigator		
Co-Investigator(s)		
Administrative staff		
Sub Total	£0.00	
<b>Other Costs</b>		
Travel and subsistence		
Equipment		
User/carer involvement		
Practitioner involvement		
Knowledge exchange activities		
Consumables		
<b>Other Costs</b>		
Sub Total	£0.00	
<b>Overheads</b>		
Overhead (20% maximum)		
Sub Total	£0.00	
<b>Total Project Costs</b>	<b>£0.00</b>	



## Table B: For UK HEI Applicants

Please see Eligibility Criteria in Call Description and Eligibility supporting document regarding eligible non-HEI UK applicants. All eligible UK organisations to use the below Budget table.

Fund Heading	Full economic cost (100%)	AHRC Network contribution	Justification
<b>Directly Incurred</b>			
Staff			
Travel and Subsistence			
Equipment			
Other Costs			
Sub Total	£0.00	£0.00	
<b>Directly Allocated</b>			
Investigators			
Estates Costs			
Other Directly Allocated			
Sub Total	£0.00	£0.00	
Indirect Costs			
Indirect Costs			
Sub Total	£0.00	£0.00	
<b>Exceptions (International Costs)</b>			
Co-Investigators			
Other Staff			
Travel and Subsistence			
Other Costs			
Overhead (20% maximum)			
Sub Total	£0.00	£0.00	
<b>Total Project Costs</b>	<b>£0.00</b>	<b>£0.00</b>	

### Budget Definitions

**Directly Incurred Costs:** These are costs that are explicitly identifiable as arising from the conduct of a project, are charged as the cash value actually spent and are supported by an audit record. They include:

- Staff: payroll costs requested for staff, full or part-time, who will work on the project and whose time can be supported by a full audit trail during the life of the project.
- Travel and Subsistence: funds for travel and subsistence for use by staff who work on the project where these are required by the nature of the work.

**Other Costs:** Costs of other items dedicated to the project, including consumables, books, survey fees, purchase/hire of vehicles, publication costs or recruitment and advertising costs for staff directly employed on the project. Items of equipment costing less than £10,000 should also be included under this heading.



**Directly Allocated:** These are the costs of resources used by a project that are shared by other activities. They are charged to projects on the basis of estimates rather than actual costs and do not represent actual costs on a project-by-project basis. They include:

- Investigators: Proposals will need to show the costs of Principal Investigator and any Co-Investigators if their time charged to the project is based on estimates rather than actual costs.
- Estates: These costs may include building and premises costs, basic services and utilities, and any clerical staff and equipment maintenance or operational costs not already included under other cost headings.

**Other Directly Allocated:** These costs may include, for example, the costs of shared pool staff or access to institutional research facilities such as equipment, IT systems. Indirect Costs These include non-specific costs charged across all projects based on estimates that are not otherwise included as Directly Allocated costs. They include the costs of the Research Organisation's administration such as personnel, finance, library and some departmental services.

**Exceptions** - These are Directly Incurred costs that Research Councils will fund in full (ie at 100%), subject to actual expenditure incurred, or items that are outside fEC.