

## **Tips for Developing your SSHRC IDG Budget Expenses RED FLAGS AND INELIGIBLES**

This document is intended to provide basic information on what to avoid (**Ineligibles**) and key areas to focus on (**Red Flags**) when creating your budget for an Insight Development Grants application. Red Flags are budget items which are technically eligible but raise the selection committee's suspicions. Red flags should be adequately justified or risk being cut from the budget. Committee members focus on these key aspects when reviewing an IDG application.

Please note: There is no separate budget justification page for the IDG. For each budget item you enter, you may provide a justification of a maximum of 500 characters (about 80 - 100 words) on the left margin of the same page where you enter the budget item. Therefore, be concise and provide only pertinent information to support your expense.

### **Ineligible Expenses**

- Remuneration of team members (applicants, co-applicants, collaborators). This includes postdoctoral fellows serving in any of these capacities.
- Travel or subsistence costs for presenters or guest speakers
- Research costs for collaborators (Only travel and subsistence for research planning and dissemination are eligible).

### **Red Flags - Personnel**

- Discrepancy in budget details; eg. Mismatch between the number of students listed in the budget and described in the Students Training section of the application and also in the budget justification.
- Insufficient or excessive funds allocated for student positions (e.g., graduate or undergraduate stipends).
- Too many students without clearly defined duties/tasks within the project.
- Consultant costs - No details and justification of the specific professional or technical services to be provided by the consultant.
- Postdocs included without explaining why Masters or PhD students cannot complete the proposed tasks for the postdoc.
- Unpaid labour by students. Students' assigned tasks and described in the Roles and Training of Students section but not included as budget items.

Tips from IDG program Officers: The salary/stipend of highly qualified personnel, including postdoctoral researchers, should be appropriately justified within the context of the research program. If a disproportionately high percentage of the requested budget is allocated to a postdoctoral researcher's salary/stipend, that is not adequately justified, the committee may question the overall feasibility of the proposed research and may consider giving a lower score on the Feasibility criterion. See [Guidelines and Rates](#) for hiring students (undergraduate or graduate) and postdoctoral fellows. **Confirm these rates with your department/faculty.**

### Red Flags - Travel Costs

- Conferences in the first year without explanation.
- Travel costs with no connection to research data collection or dissemination.
- Travel with Non-flex economy fares.
- Per diems not supported by institutional rates.

### Red Flags - Other Expenses (Supplies, Non Disposable Equipment, etc.)

- Excessive or unjustified equipment and supply costs (e.g., laptops not justified as unavailable through the university or not shared among students).
- Failure to mention or justify the use of tools, data, or free software explicitly.
- Open Access fees not justified; Explain why you need to publish in journals without open access. [See UAlberta Library negotiated licence for open access](#)

### General Errors to Avoid

- Budget requests exceeding \$75,000 IDG value.
- Annual budget below the \$7,000 minimum.
- Budgeted items not clearly justified.
- Miscalculations between the budget and justification. Totals not matching.

### Final recommendations

- Follow the principle of minimum essential funding.
- Be reasonable and justify all proposed expenditures.
- Relate all proposed items clearly to research objectives and methodology.
- Having a smaller budget is not necessarily a good thing. An insufficient budget will make your application fail.
- Describe other sources of funding, if applicable.
- Expenses must conform to the rates and regulations in effect here at the UofA.
- Do not pad your budget.
- JUSTIFY, JUSTIFY, JUSTIFY.

Committee members may recommend budget reductions if the budget is inadequately justified or inappropriate, or where savings can be achieved without jeopardizing the project objectives.

Committees may also reduce the score for the Feasibility if the budget is insufficiently justified. Automatic failure if 50% or more of expenses are inadequately justified or deemed inappropriate by the committee. The committee may consider giving an unsatisfactory score to an application on the Feasibility criterion if 30% or more of the budget is cut.

Looking for further Budget support? Contact your IDG Research Partner: Sylvia Ijeoma Madueke. Ask me about RPnet/CSSH Budget review: [imadueke@ualberta.ca](mailto:imadueke@ualberta.ca)