Budget Guidelines for BHEARD Training Program Proposals  
Cohort Beginning Fall 2016

Use of the Budget Template

1. The top section of the budget template contains information on the number of students and the annual rates of increase of various cost categories which will be referenced by formulas used in the body of this budget.
   a. Enter your University name in cell B1
   b. Enter the country with which the students are associated in cell C2
   c. Enter the number of PhD students covered by your budget in cell F2.
   d. Enter the names of the PhD students in cell I2.
   e. You may modify the cost increase factors to conform to policies or conditions at your university.

2. The BHEARD negotiated IDC rate is 26% per the RFA.

3. Formulas in the bottom right of the template will calculate the per-student costs for PhD students. **Please do not modify these formulas** since they will be used to facilitate final decisions about the number of students that can be supported for a given country.
   a. These “program costs per student” are what should be entered in the Budget section (D.2) of the “Country Submission Form.”

4. The Student Supplies and Student Allowances sections contain some illustrative cost figures. As noted in section 3.b at the bottom of the next page, these may be modified to suit your university’s policy or practice, subject to maintaining consistency with guidelines in ADS 253 pp. 39-41.

5. For budget purposes, a year is defined as an academic year to include Fall, Winter/Spring and Summer semesters.

General Guidelines


2. Ph.D. programs should consist of up to three academic years at the U.S. university followed by up to one year in the home country for research, dissertation write-up, and defense. All program activities related to supporting the Ph.D. student should be designed and budgeted to occur within four years, i.e., by September 30, 2020.

3. USAID policies regarding dependents are outlined in ADS 252 section 252.3.4. No costs related to dependents should be included in the budget, USAID strongly discourages dependents traveling to the US with BHEARD scholars. The USAID Country Mission has the final authority if dependents will be allowed to join the BHEARD scholar.
4. Final oral examinations, including defense of the thesis/dissertation, should if possible be conducted while the student is in the home country, using voice- or video-conferencing technology.

5. It is BHEARD policy that no salaries for faculty mentors be paid by the BHEARD project.

6. **Please include a budget narrative along with your budget.** The budget and/or narrative should explain the basis for the budgeted figures, including justification and method of calculation. See guidelines on budget format below.

**Items to Include**

1. **Health insurance.** Due to the many changes in the health care laws and USAID requirements, BHEARD will be purchasing HAC insurance on each scholar as additional coverage while they are in the US. You may budget for health insurance provided for international students by your university, e.g., as part of a graduate research assistantship, if the coverage is comparable to that of HAC insurance and international students are allowed to waive your university health care, this is allowable by USAID. Information on HAC insurance can be found at: http://trainethelp.usaid.gov/HACIns/index.htm

2. **Travel costs.**
   a. Trainee travel from home country to U.S. will be covered by BHEARD. Please budget for their one-way return trip home and one round trip pre-dissertation mid-program ticket for each student. U.S. carriers must be used as stipulated in the Fly America Act.
   b. Return baggage allowance (see ADS 253 p. 40).
   c. One trip by the student’s faculty advisor/mentor to assist in the design and/or initial implementation of the student’s research after the student has returned home (Year 3). Costs should include air travel, 12 days of per diem, hotel costs, visa and vaccination costs, and any necessary in-country travel. Per diems should be calculated using standard U.S. government rates.
   d. If the effective date of your institution’s health insurance (or HAC insurance) is later than the trainee’s departure from the home country, included on the budget sheet is funding for short-term health insurance to cover the trainee from the date of departure to the effective date of the long-term health insurance at your institution. The BHEARD Office will make arrangements for this short-term travel insurance.

3. **Trainee costs at your institution:**
   a. **Stipend** (paid through assistantship).
      i. If you plan to give the students assistantships, you can follow your university's guidelines to budget this line item. However, USAID guidelines require that you provide at least the minimum amount, after taxes, of the monthly maintenance rate established for your area by the International Institute of Education (IIE). These are now available on the TraiNet-VCS Web at http://trainethelp.usaid.gov/Messages/message_mmr.html.
      ii. Stipends should not be budgeted during the in-country research period following the trainee’s return home.
   b. **Health insurance** (discussed in (1) above).
   c. **Tuition and fees** for the period of enrollment in the U.S., and also any tuition and fees that may be required by your institution during the period when trainees are in-country, e.g., during a Ph.D. student’s mid-program trip and during the thesis/dissertation research phase.
Please included any and all mandatory fees charged to enrolled students. Most graduate assistantships cover 9 tuition credits for Fall & Spring semesters and 5 tuition credits for summer, if students will be enrolled for additional credits these excess costs should be included in your budget and justification or request prior approval to enrollment.

d. **Other Allowances.** We recommend including the following allowances, which should be itemized in the budget. ADS 253 pp. 39-41 indicates the required or minimum dollar amounts for some of these allowances. **Otherwise, the levels of these allowances can be set as a function of policy, practice, and costs at your institution.**

<table>
<thead>
<tr>
<th>Student Supplies</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Books and Supplies</td>
<td>$1300</td>
</tr>
<tr>
<td>Laptop</td>
<td>$1200</td>
</tr>
<tr>
<td>Software</td>
<td>$300</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Student Allowances</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Settling In Allowances</td>
<td>$2250</td>
</tr>
<tr>
<td>Membership fees to</td>
<td>$200</td>
</tr>
<tr>
<td>professional societies</td>
<td></td>
</tr>
<tr>
<td>Attendance at professional meetings</td>
<td>$1200</td>
</tr>
<tr>
<td>Thesis research allowance</td>
<td>$10,000</td>
</tr>
<tr>
<td>Post-completion grant</td>
<td>$2000</td>
</tr>
<tr>
<td>Thesis printing</td>
<td>$250</td>
</tr>
<tr>
<td>Return baggage fee</td>
<td>$331</td>
</tr>
</tbody>
</table>

i. Settling-in allowance has been set at $2250 per BHEARD student. Settling-in allowance is to cover the cost of travel from US airport to arranged housing, hotel accommodations if needed until students’ apartment/housing becomes available, and all costs involved in setting up household. This will be paid by BHEARD Project Management and sent as a check to the student’s University.

ii. Allowances for books and supplies, computer and software, membership and attendance at professional meetings, and thesis printing and binding.

iii. Seed grant for field research, intended to provide at least partial funding that could be supplemented by matching funds or funds leveraged from other sources. The amount set for this allowance is $10,000 for Ph.D. students.

iv. Post-completion start-up or reintegration grant for the returning student. This allowance has been set at is $2,000 for Ph.D. students.

**Budget Format** - Please use the budget template provided.