Proposal Checklist for Direct Charging Administrative/Clerical Expenses
(Labor and Non-Labor) to Sponsored Projects

This checklist must be completed and certified by the Project Director and attached to the “Proposal Routing and Approval Form”, 204-01A whenever a proposal includes administrative or clerical salaries or certain non-labor costs such as office supplies, local telephone costs, postage, and/or memberships and dues to professional organizations (please refer to the “Policy on Consistent Treatment of Direct and Facilities & Administrative Costs”). It remains the Project Director’s responsibility to comply with sponsor and university regulations and to supply all required documentation. **Once the sponsored agreement is awarded, the costs reflected above can only be charged if they are specifically reflected in the approved budget and have not been deleted by the funding agency.**

The following three criteria must be met for these costs to be considered for direct charging:

1. The person’s activities and/or the non-labor costs must be specifically and readily identifiable to the project with a high degree of accuracy.
2. The position and/or non-labor costs are required by the project scope, due to the project’s special purpose or circumstances.
3. The position and/or non-labor costs must be specifically budgeted as a line item in the proposal budget with duties/requirements discussed and justified in the proposal narrative.

**Labor Costs:** The duties of _____________________________ (individual or position) include (circle):

1. Extensive data accumulation, analysis, entry, labeling, surveying, tabulation, cataloguing, technical illustration, manuscript and publication production, searching literature, and reporting.
2. Making complex travel, meeting and visa arrangements for project collaborators or workshop participants; organizing workshops or conferences for large numbers of participants; extensive desktop publishing of workshop materials.
3. Managing the logistics of extensive field operations necessitated by the nature of the award.
4. Coordinating with subcontractors or collaborators (often at other institutions) involved in this award; or coordinating a research program supported from multiple sources.
5. Performing administrative services for a major on- or off-campus research operation with separate facilities.
6. Detailed budgetary and financial management of at least .25FTE effort related directly to and required by this award.

**Non-Labor Costs:**
If non-labor costs (e.g., office supplies, local telephone, postage, memberships and dues) normally classified as facility and administrative expenses are included in this proposal budget briefly describe the special or unique circumstances justifying these costs as direct charges to the project (ref: Policy on Consistent Treatment of Direct and F&A Costs, sections 9 and 10).

________________________________________________________
________________________________________________________
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My signature below certifies to the statements made above:

P.I. Name ___________________________ Signature ___________________________
College/Unit ___________________________ Dept./Prog. ___________________________
Project Title ___________________________________________________________
Sponsoring Agency ___________________________________________ Date ___________