

Planning Your Budget

The First Step in Estimating the Project Cost

Prior to drafting a budget, go through this checklist to identify the major categories for which you will need funding. Once identified, you can begin to allocate amounts to each category. Work with your project team.

1. Identify whether you will need to allocate funds to the below categories to cover expenses at UF and/or at a partner institution.

Budget Category	UF Expense	Sub awards to Partner or Non UF Expenses
A. Salaries and Wages		
B. Equipment		
C. Materials and Supplies		
D. Travel		
E. Services		
F. Other		

2. Will you need a pcard? Yes No

If yes, how will the pcard be used?

3. Will you need a cash advance? Yes No

If yes, for what purpose?

4. Check the categories for which you will need to budget.

A. Salaries and Wages

- | | |
|---------------------------------|---|
| Academic personnel | Administrators |
| Research assistants | Editorial assistants |
| Students | Technicians |
| Graduate Student Tuition | Study/clinical coordinators |
| Stipends (training grants only) | Hourly personnel |
| Consultants | Fringe benefits |
| Interviewers | Salary increases in proposals that extend into a new year, e.g., Cost of Living increases |
| Computer programmer | |
| Data managers or analysts | |

B. Equipment

- Fixed equipment
- Movable equipment
- Office equipment
- Equipment installation

C. Materials and Supplies

- Office supplies specifically for project
- Communications
- Computers under \$5,000
- Test materials or samples
- Questionnaire forms
- Data access
- Animals
- Animal care
- Laboratory supplies
- Glassware
- Chemicals
- Electronic supplies
- Report materials and supplies
- Satellite Phone

D. Travel*

- Professional conferences
- Conference registration fee
- Field permits
- Sponsor meetings
- Travel for consultation
- Consultants' travel
- Mileage for research participants
- Meals
- Visas
- Automobile rental
- Aircraft/ship rental

*UF Policy: <http://www.fa.ufl.edu/directives-and-procedures/travel/>

[Transportation costs, lodging and per diem related to the following:](#)

E. Services

- Computer use/data storage
- Duplication services (reports, etc.)
- Publication costs
- Photographic/graphic services
- Service contracts
- Data analysis

F. Other

- Space usage
- Alterations and renovations
- Purchase of data, periodicals, books
- Subjects/Research participants
- Patient reimbursement
- Tuition and fees
- Vaccinations
- Subcontracts/Sub awards

Indirect Costs – [Follow UF Facilities and Administrative \(F&A\) Guidelines](#)