

***Sample Budget and Budget Justification Formats***

***Budget Format, Example #1***

**Year One Budget Summary**

| <b>Cost Category</b>      | <b>SPONSOR<br/>REQUEST</b> | <b>BU COST<br/>SHARE</b> | <b>OTHER<br/>COST SHARE</b> | <b>TOTAL</b>       |
|---------------------------|----------------------------|--------------------------|-----------------------------|--------------------|
| Direct Labor              | \$176,811                  | \$29,805                 | \$2,000                     | \$208,616          |
| Fringe Benefits           | \$44,202                   | \$7,451                  | \$500                       | \$52,153           |
| Travel and Transportation | \$157,640                  | \$0                      | \$5,500                     | \$163,140          |
| Supplies and Equipment    | \$42,700                   | \$400                    | \$0                         | \$43,100           |
| Consultants (non- BU)     | \$62,000                   | \$0                      | \$101,500                   | \$163,500          |
| Contracts                 | \$78,527                   | \$0                      | \$13,258                    | \$91,785           |
| Subgrants                 | \$150,000                  | \$0                      | \$0                         | \$150,000          |
| Other                     | \$42,750                   | \$0                      | \$2,000                     | \$44,750           |
| <b>TOTAL DIRECT</b>       | <b>\$744,022</b>           | <b>\$35,868</b>          | <b>\$124,683</b>            | <b>\$917,044</b>   |
| <b>TOTAL INDIRECT</b>     | <b>\$91,942</b>            | <b>\$15,499</b>          | <b>\$1,040</b>              | <b>\$108,481</b>   |
| <b>TOTAL PROJECT</b>      | <b>\$832,428</b>           | <b>\$50,771</b>          | <b>\$125,683</b>            | <b>\$1,025,525</b> |

**Budget Format, Example #2**

*(Note: This format incorporates a brief narrative after the major items.)*

**BUDGET**

|                                                                                                                                                                                                                                                                                                           |          |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|
| <b><u>PERSONNEL</u></b>                                                                                                                                                                                                                                                                                   | \$15,518 |
| <b>Principal Investigator,</b> _____ (Effort: 20% in Year 1, 10% in Year 2)<br>Recruit, hire and supervise project staff, maintain contact with LTC study sites, collect and analyze qualitative data, assist with guidebook preparation and prepare manuscripts for publication.                         |          |
| <b>Co-Principal Investigator,</b> _____ (Effort: 10% in Year 1, 20% in Year 2)<br>Assist with data analysis, design educational programs, evaluate educational programs, assist with guidebook preparation and prepare manuscripts.                                                                       | \$14,508 |
| <b>Research Assistant (Graduate Student)</b><br>(Effort: 960 hrs @\$13/hr in Year 1, 480 hrs @\$13.65 in Year 2)<br>Assist with recruiting potential subjects, data collection from focus groups and interviews, coding data, development of educational modules, and evaluation of educational programs. | \$19,032 |
| <b>Secretarial</b><br>(Effort: 200 hrs @\$8/hr in Year 1, 400 hrs @ \$8.40/hr in Year 2)<br>Prepare study materials, transcribe qualitative data, photocopy, and prepare educational materials and forms for evaluation.                                                                                  | \$4,960  |
| <b><u>FRINGE BENEFITS</u></b><br>(25% of Principal, Co-Investigator, and of Secretarial wages)                                                                                                                                                                                                            | \$8,746  |
| <b><u>SUBTOTAL</u></b>                                                                                                                                                                                                                                                                                    | \$62,764 |
| <b><u>TRAVEL</u></b><br>(3 visits/study site @ 10 sites @ 10mi/site @ \$.55/mi)<br>(20 interviews @ 10 mi/interview @ \$.55/mi)                                                                                                                                                                           | \$275    |
| <b><u>OFFICE SUPPLIES</u></b><br>(Marantz tape recorder @ \$200, 50 cassette tapes @ \$3 each, Crown sound grabber microphone @\$60) (Photocopy, phone, and fax: \$300 in Years 1&2)                                                                                                                      | \$1,010  |
| <b><u>PUBLICATIONS</u></b><br>Guidebook expenses including preparation, printing costs, and copying.                                                                                                                                                                                                      | \$700    |
| <b><u>WORKSHOP</u></b><br>Announcements, course materials, speaker honorarium, and refreshments for participants.                                                                                                                                                                                         | \$1,000  |
| <b><u>TOTAL</u></b>                                                                                                                                                                                                                                                                                       | \$65,749 |
| <b><u>INDIRECT COSTS</u></b> (52% of Direct Labor)                                                                                                                                                                                                                                                        | \$28,089 |
| <b><u>TOTAL BUDGET</u></b>                                                                                                                                                                                                                                                                                | \$93,838 |

***Budget Format, Example #3***  
**PROJECT BUDGET**

**Project:** \_\_\_\_\_  
**Institution:** Bradley University  
**Principal Investigator:** \_\_\_\_\_

**ITEM**

**AMOUNT  
REQUESTED**

**Personnel:**

Principal Investigator Salary, Academic Year  
(50% effort for four months) \$14,513

Principal Investigator Salary, Summer  
(100% effort for two months) \$12,644

Student Personnel (\$7.75/hr x 10hrs/wk x 26 wks) \$2,015

Graduate Research Assistant (50% effort for 6 months) \$6,013

**Subtotal All Personnel** \$35,185

Fringe Benefits – Principle Investigator \$4,892  
(Academic Year fringe calculated at the University rate of 25%)  
(Summer fringe calculated at the University rate of 10%)

**Total Personnel Costs** \$40,077

**Non-Personnel Costs:**

Supplies/Miscellaneous \$350

Publications \$1,000

Tuition credit remission for Research Assistant \$3,564

Travel \$1,200

Other \$6,364

**Total Direct Costs** \$52,555

Administrative/Indirect Costs \$18,296  
(using a direct labor costs formula of 52%; base is \$35,185)

**TOTAL PROJECT COST** \$70,851

***Budget Format, Example #4***  
**BUDGET**

***The Bradley Community Service/Citizenship Training Initiative (Note: Just a fictitious title)***

**PERSONNEL**

|                                                         |          |
|---------------------------------------------------------|----------|
| Project Director, 30% annual salary of \$43,000         | \$12,900 |
| Administrative Assistant, 25% annual salary of \$20,000 | \$5,000  |
| Faculty Advisor, 10% annual salary of \$42,500          | \$4,250  |

**FRINGE BENEFITS**

|                                                                         |         |
|-------------------------------------------------------------------------|---------|
| 25% for Project Director, Administrative Assistant, and Faculty Advisor | \$5,538 |
|-------------------------------------------------------------------------|---------|

**TRAVEL**

|                                                                              |         |
|------------------------------------------------------------------------------|---------|
| Local mileage, 1,500 miles @ \$.55.5/mile                                    | \$825   |
| Travel and Lodging for trainers at training sites and to conduct site visits | \$2,500 |

**MATERIAL AND SUPPLIES**

|                                               |         |
|-----------------------------------------------|---------|
| Office Supplies and postage                   | \$1,000 |
| Printing of curriculum and training materials | \$2,000 |

**TRAINERS**

|                                                                                 |          |
|---------------------------------------------------------------------------------|----------|
| (NAME INSERTED HERE)                                                            | \$19,850 |
| Assessment Questionnaire Development, 12 hrs @ \$50/hr, \$600                   |          |
| Data Analysis & Report, 40 hrs @ \$75/hr, \$3,000                               |          |
| Curriculum Development, 80 hrs @ \$50/hr, \$4,000                               |          |
| Training Delivery Preparation, 4 courses @ 20 hrs @ \$50/hr per course, \$4,000 |          |
| Training Delivery, 4 courses @ 20 hrs @ \$75/hr per course, \$6,000             |          |
| Feedback & Evaluation, 30 hrs @ \$75/hr, \$2,250                                |          |

|                                                        |         |
|--------------------------------------------------------|---------|
| (NAME INSERTED HERE)                                   | \$5,000 |
| Training Preparation and Delivery, 10 sessions @ \$500 |         |

|                          |                 |
|--------------------------|-----------------|
| <b>TOTAL DIRECT COST</b> | <b>\$58,862</b> |
|--------------------------|-----------------|

|                                                  |                 |
|--------------------------------------------------|-----------------|
| <b>TOTAL INDIRECT COST (52% of Direct Labor)</b> | <b>\$11,518</b> |
|--------------------------------------------------|-----------------|

|                           |                 |
|---------------------------|-----------------|
| <b>TOTAL PROJECT COST</b> | <b>\$70,380</b> |
|---------------------------|-----------------|