Budget & Budget Justification Tips for Preparing a Strong Research Proposal

The *Budget and Budget Justification* sections of a research proposal demonstrate to reviewers that you understand what resources are required to effectively operationalize your research project and that you’ve thoughtfully mapped out this important part of your research plan.

**BUDGETS:**

**Principle:** The expenses listed in a good research budget should *mirror and support* the stages and activities noted in your methodology and, if applicable, your knowledge mobilization/dissemination plan.

**Tip:** To develop a list of potential expenses, first list the key stages of your methodology. Then, think of all the necessary activities that enable those stages to take place. Finally, think of the specific resources (people, equipment, travel, etc.) that you’ll need to enable those activities.

**Example #1**

**Stage:** Data Collection  
**Activity:** Face-to-face interviews with research participants  
**Resources:** Supplies to create recruitment adverts  
Digital audio recorders  
Travel costs to participant site  
Transcription services  
Personnel to develop interview questions, engage in participant recruitment, coordinate research participants, and conduct interviews

**Example #2**

**Stage:** Data Analysis  
**Activity:** Data coding, software analysis, interpreting results  
**Resources:** Site licence for SPSS or other analytic software  
Personnel to code the collected data, run the analysis, interpret findings

Ultimately, reviewers should not be surprised by your budget request after they’ve read your methodology (again, your budget should reinforce your methods).

**Eligible Budget Expenses**

BUDGET JUSTIFICATIONS:

**Principle:** The key idea behind a budget justification rests in the name itself. You aren’t simply presenting a list of expenses; you are, as succinctly as possible, *justifying* in narrative form the rationale for each expense that you’re requesting.

**Tip:** The budget justification is a strategic way to remind and to reinforce for reviewers key elements of your methods. Provide enough reverent detail to allow the reviewer to understand the connection between the expense and the operational requirements of the project. Budget justifications can be presented in a number of formats, but tables typically read particularly well.

Example of a poor budget justification.

<table>
<thead>
<tr>
<th>BUDGET CATEGORY</th>
<th>EXPENSE</th>
<th>JUSTIFICATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personnel</td>
<td>Assistant</td>
<td>One student at $400 to assist with interviews.</td>
</tr>
<tr>
<td>Supplies</td>
<td>Paper and memory</td>
<td>For posters and back up. About $30.</td>
</tr>
<tr>
<td>Equipment</td>
<td>Digital audio recorder</td>
<td>One at $100 for interviews.</td>
</tr>
<tr>
<td>Travel</td>
<td>Gas</td>
<td>Gas for travel to sites.</td>
</tr>
</tbody>
</table>

Example of a *better* budget justification

<table>
<thead>
<tr>
<th>BUDGET CATEGORY</th>
<th>EXPENSE</th>
<th>JUSTIFICATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personnel</td>
<td>Graduate Student Research Assistant</td>
<td>$400. One MA GRA for 5 hours per week for 4 weeks at $20/hour = $400. To assist with organizing and conducting participant interviews, administering surveys, coding and analyzing data.</td>
</tr>
<tr>
<td>Supplies</td>
<td>Paper, portable memory</td>
<td>$30. Paper to create recruitment posters for study and to print out surveys; 2 X 4 GB USB flash drives for remote data back-up.</td>
</tr>
<tr>
<td>Equipment</td>
<td>Digital audio recorder</td>
<td>$100. One digital audio recorder at $100 (Best Buy quote 2016-02-11) to use for interviews with elementary school teachers.</td>
</tr>
<tr>
<td>Travel</td>
<td>Mileage for data collection</td>
<td>$21. Gas for travel by car to four different elementary schools across Greater Vancouver to conduct interviews with elementary school teachers. 42 KM over 4 trips at $.49/kilometer (UBC mileage rate).</td>
</tr>
</tbody>
</table>

**Tips**
- **For personnel**, try and specify the type or nature of the role (e.g. MA student), a detailed breakdown of the time needed and the hourly rate or stipend, and the actual activities to be undertaken.
- **For supplies**, be specific about their purpose in the project.
- **For equipment**, supply quotes; they help convince reviewers that you didn’t pull the cost out of thin air.
- **For travel**, use your organization’s official per diem and mileage rates.
- **Never supply “buffer” line items**. Your proposal will typically be reviewed under the lens of “minimal essential funding,” so no “miscellany.” Either you know what you need and what it costs, or you don’t.