



HR Budget Planning & Allocation Checklist 2026

Pre-Planning & Goal Alignment

Define the strategic objectives for 2026 and align the HR budget with overall company financial targets and growth projections.

Budget Planning Start Date

Enter date...

Primary HR Strategic Objective 2026

Write something...

Summary of Alignment with Corporate Goals

Write something...

Key Stakeholders Involved in Planning

- ☐ CFO
- ☐ HR Director
- ☐ Department Heads
- ☐ Operations Manager

Budgeting Methodology

- ☐ Zero-Based Budgeting
- ☐ Incremental Budgeting
- ☐ Activity-Based Budgeting

2025 Final Budget Comparison Report

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Personnel & Compensation Costs

Identify and estimate all costs related to salaries, bonuses, merit increases, benefits, and upcoming payroll tax adjustments.

Estimated Annual Salary Expenditure

Enter a number...

Planned Merit Increase Budget

Enter a number...

Planned Bonus Structures

- ☐ Annual Performance Bonus
- ☐ Sign-on Bonuses
- ☐ Commission-Based Incentives
- ☐ Retention Bonuses

Benefit Premiums Allocation

Write something...

Salary Benchmarking Report

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Budget Review Deadline

Enter date...

Recruitment & Talent Acquisition Expenses

Allocate funds for job board subscriptions, recruitment agency fees, background check services, and employer branding initiatives.

Job Board Subscription Fees

Write something...

Estimated Recruitment Agency Fees

Enter a number...

Sourcing Channels to Fund

- ☐ Social Media Advertising
- ☐ Employee Referral Bonuses
- ☐ University Career Fairs
- ☐ Niche Industry Job Boards
- ☐ Internal Talent Marketplace

Background Check & Screening Budget Justification

Write something...

Budget Allocation Deadline

Enter date...

Vendor Quotes & Proposals

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Training & Professional Development

Budget for employee upskilling, leadership workshops, certification programs, and external training vendor fees for the 2026 fiscal year.

Training Program Name

Write something...

Estimated Cost Per Participant

Enter a number...

Target Audience

- ☐ New Hires
- ☐ Management/Leadership
- ☐ Technical Staff
- ☐ Administrative Staff
- ☐ All Employees

Scheduled Completion Date

Enter date...

Learning Objectives & ROI Justification

Write something...

Training Vendor Quote

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HR Technology & Software Subscriptions

Review and allocate funds for HRIS, ATS, payroll software, LMS, and any new HR automation tools or integrations.

Software Name

Write something...

Annual Subscription Cost

Enter a number...

Subscription Model

- ☐ Monthly
- ☐ Annual
- ☐ Per User/Seat

Renewal Date

Enter date...

Software Category

- ☐ HRIS/HRMS
- ☐ ATS (Applicant Tracking System)
- ☐ LMS (Learning Management System)
- ☐ Payroll & Benefits
- ☐ Performance Management

Justification for Expenditure

Write something...

Vendor Quote/Contract

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Employee Engagement & Culture Programs

Estimate costs for employee recognition programs, team-building events, wellness initiatives, and internal communication tools.

Proposed Engagement Initiatives 2026

Write something...

Estimated Budget Allocation

Enter a number...

Target Engagement Channels

- ☐ Internal Newsletters
- ☐ Slack/Microsoft Teams
- ☐ Town Hall Meetings
- ☐ Company Intranet
- ☐ Physical Office Signage

Implementation Deadline

Enter date...

Detailed Program Roadmap

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Primary Focus Area

- ☐ Employee Retention
- ☐ Diversity & Inclusion
- ☐ Mental Health & Wellness
- ☐ Skill Development

Compliance & Administrative Overheads

Account for legal fees, HR audits, regulatory compliance software, office supplies, and physical document management costs.

Regulatory Compliance Audits Required

- ☐ EEO/EEOC Audit
- ☐ Labor Law Poster Compliance
- ☐ GDPR/Data Privacy Audit
- ☐ FLSA Wage & Hour Audit
- ☐ OSHA Safety Audit

Estimated Legal & Professional Fees

Enter a number...

Document Retention/Archiving Costs

Compliance Software Subscription Renewal Details

Supporting Legal Invoices or Quotes

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Compliance Audit Completion Deadline

Contingency & Emergency Fund

Set aside a reserve for unforeseen labor disputes, sudden headcount expansions, or unexpected regulatory changes.

Contingency Fund Rationale

Total Contingency Reserve Amount

Primary Risk Factors Addressed

- ☐ Sudden Headcount Expansion
- ☐ Legal & Compliance Disputes
- ☐ Unexpected Turnover/Replacement Costs
- ☐ Market Salary Inflation
- ☐ Software/Tool Price Increases

Risk Assessment Documentation

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Budget Controller Approval

Budget Review & Approval Workflow

Finalize the budget draft, perform a variance analysis against previous years, and submit the final document for executive sign-off.

Budget Submission Date

Enter date...

Reviewer Name

Write something...

Review Status

- ☐ Pending Review
- ☐ Approved
- ☐ Revision Required
- ☐ Rejected

Reviewer Comments & Feedback

Write something...

Final Approved Budget Document

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Executive Approval Signature

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👍 Finish

 Generate Sample Report