



TOOL 1.7: Budget Template

Use this tool as a template for creating your own budget spreadsheet. This was adapted from www.cdc.gov/leanworks. Alter to fit your program needs or simply use the headings as a jumping off point to fill in your own template.

Line Items	Cash expense (represents a new cost to the organization that will have to come from internal or external resources)	In-kind (reallocation of existing staff, shared budgets, or resources)
Patient Navigator(s) salary		
Supervisor(s) salary		
Fringe benefits		
Duplication and Printing		
Educational materials		
Marketing materials		
Equipment and Maintenance		
Equipment purchase		
Computer/copier maintenance		
Marketing		
General media placement (radio, print, web, television)		
Postage		
Client mailings		
Overnight delivery services		
Marketing materials		
Utilities, Telecommunications		
Utility services		
Long-distance services		
Website service		
Supplies		
Office & meeting supplies		
Software		
Computer supplies		
Travel		
Staff meeting travel, lodging, and per diem for training/conferences		
Local travel to community meetings, etc.		
Other Direct Costs		
Meeting & event refreshments		
Patient Navigator training & tuition		
Transportation		
Evaluation expenses		
Indirect Costs (applied at organizational level to cover costs of shared resources)		
TOTAL		