

Tool 1

Budget Planning

Activity	Measure	Quantity	Rate	Total Cost
Conduct team member training				
Preparation (data review & materials)	Days			
On site	Days			
Materials				
Travel (mileage)	Miles			
Lunch @ per diem	Days			
Conduct the leadership team meeting				
Preparation (data review & materials)	Days			
On site	Days			
Materials				
Travel (mileage)	Miles			
Lunch @ per diem	Days			
Conduct the all-staff meeting				
Preparation (planning)	Days			
On site	Days			
Materials				
Travel (mileage)	Miles			
Lunch @ per diem	Days			
Conduct the on-site visit*				
Preparation (surveys, etc.)	Days			
On site	Days			
Materials				

*To determine on-site time, see the section “Estimating Time and Costs” in chapter 11.

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Activity	Measure	Quantity	Rate	Total Cost
Conduct the on-site visit (continued)				
Hotel	Nights			
Travel (mileage)	Miles			
Meals @ per diem	Days			
Present final report to staff				
Preparation (report)	Days			
On site	Days			
Materials				
Travel (mileage)	Miles			
Lunch @ per diem	Days			
Strategic plan workshop				
Preparation (materials)	Days			
On site	Days			
Materials				
Travel (mileage)	Miles			
Lunch @ per diem	Days			
Miscellaneous expenses				
Supplies/postage/copies				
Refreshments/snacks				
Hotel meeting room				
Total				