

**Tool 1.1b: BUDGET WORKSHEET – PLANNING TEAM EXPENSES**

**Section in Planner: Phase 1, Step 1 (1.1b)**

**Why is this important?**

Depending on the size and scope of your initiative, your planning team may incur some expenses over the planning cycle. While not typically a large budget concern, be aware of out-of-pocket meeting expenses for members, especially your volunteers, people with stroke and their caregivers. You may have additional administrative costs related to gathering and sharing the necessary information to proceed with your plan.

**How to use this tool:**

This table outlines potential planning team expenses; use and adapt to suit your own setting and circumstances, as needed.

*Note: An Excel worksheet version is also provided.*

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| --- | --- | --- | --- | --- |
| **BUDGET Worksheet - PLANNING TEAM EXPENSES** | | | | |
| Use this spreadsheet as you develop your project charter to consider management of planning team expenses. Add or delete rows to include other expenses, as necessary.  Note: A separate budget template is provided for forecasting costs related to the exercise program itself. | | | | |
| **Item** | **Description** | **Estimated cost ($)** | **Funding source** | **Notes** |
| **COMPENSATION OF TEAM MEMBERS AND/OR ADVISORS (if applicable)** | |  |  |  |
| Honorarium/stipend for stroke survivor or caregiver advisor(s) |  |  |  |  |
| Honorarium/stipend for health care provider advisor(s) |  |  |  |  |
| Honorarium/stipend for other team members |  |  |  |  |
| Reimbursement of caregiver costs to attend meetings |  |  |  |  |
| Reimbursement for time of caregiver/support person to accompany person with stroke to meetings |  |  |  |  |
| Add/delete rows as needed |  |  |  |  |
| **TRAVEL COSTS FOR TEAM MEMBERS AND/OR ADVISORS (if applicable)** | |  |  |  |
| Travel costs to and from planning meetings, e.g. bus or taxi fare, mileage reimbursement, driver costs |  |  |  |  |
| Parking costs at meeting location |  |  |  |  |
| Add/delete rows as needed |  |  |  |  |
| **MEETING COSTS (if applicable)** |  |  |  |  |
| Fee to rent meeting space |  |  |  |  |
| Catering at meetings |  |  |  |  |
| Video conferencing application (e.g., Zoom license) |  |  |  |  |
| Printing and distribution of planning materials and meeting notes |  |  |  |  |
| Add/delete rows as needed |  |  |  |  |
| **OTHER COSTS (if applicable)** |  |  |  |  |
| Other out-of-pocket expenses? |  |  |  |  |
| Add/delete rows as needed |  |  |  |  |
|  | **TOTAL** |  |  |  |

**Phase 1, Step 1: Budget Worksheet – Planning Team Expenses**