

APPENDIX H - SAMPLE BUDGET

WORKSITE WELLNESS - SAMPLE BUDGETS

Two budget samples are posted here. The first sample is list of categories that you might want to consider as you're putting a budget together. The list of categories serves as "prompts" for you to consider as you think about what your program might do to implement strategies.

The second sample provides a longer list of line items and is best suited for established programs with a larger budget.

HIGH LEVEL CATEGORY LIST

(This budget sample provides a list of categories to consider regardless of the size of your budget)

	2009	2010	Difference	Rationale
WAGES				
Staff				
Wellness committee stipend				
HARDWARE/SOFTWARE				
Phones				
Computers and computer accessories				
OFFICE SUPPLIES				
Paper, pens, envelopes, etc/				
EDUCATION/TRAINING/CONFERENCES				
Staff and Committee Members				
TRAVEL/MILEAGE EXPENSES				
Staff and Committee Members				
ORGANIZATIONAL AFFILIATIONS				
Memberships (WELCOA, National Wellness Institute)				
PUBLICATIONS				
American Journal of Health Promotion, etc.				
HEALTH RISK ASSESSMENTS				
Cost per HRA (paper or online) and other fees				
Incentive per participant				
Other incentives (giveaways or food)				
BIOMETRIC SCREENINGS				
Cost per screen and other vendor fees				
Incentive per participant				
Other incentives (giveaways or food)				
EMPLOYEE FLU SHOTS				
Cost per shot				
HEALTH COACHING				
Cost per participant				
HEALTH EDUCATION PRESENTATIONS				
Cost per presentation				
HEALTH EDUCATION LITERATURE				
Brochures, Newsletters, Books				
WEB PORTAL VENDOR				
Customized employee wellness website – vendor fee				
CAMPAIGN MATERIALS				
Events, manuals, materials, incentives, etc.				
ONSITE FITNESS SERVICES				
Fitness class(es), Trainer(s), Fitness equipment, etc.				
OTHER				
Event reusable materials, equipment, etc				

DETAILED BUDGET

(This budget sample provides a more detailed list of line items to consider for your budget)

	2009	2010	Difference	Rationale
WAGES				
Staff 1 (FTE)				
Staff 2 (FTE)				
Staff 3 (FTE)				
Staff 4 (FTE)				
Wellness committee stipend				
Other				
(Temp Help)				
(Contractors)				
Incentives, prizes				
HARDWARE/SOFTWARE				
Phones				
Computers				
Printers				
Software				
Software updates				
Maintenance				
OFFICE SUPPLIES				
Paper				
Pens				
Files				
Envelopes				
Forms				
Other				
EDUCATION/TRAINING/CONFERENCES				
Staff 1 (FTE)				
Staff 2 (FTE)				
Staff 3 (FTE)				
Staff 4 (FTE)				
TRAVEL/MILEAGE EXPENSES				
Staff 1 (FTE)				
Staff 2 (FTE)				
Staff 3 (FTE)				
Staff 4 (FTE)				
ORGANIZATIONAL AFFILIATIONS				
WELCOA				
Wisconsin Wellness Council				
National Wellness Institute				
Other				
PUBLICATIONS				
American Journal of Health Promotion				
The Art of Health Promotion				
Health Promotion Practitioner				
Health Promotion Practice				
Health Promotion International				
Wellness Program Manager Advisor				
Other				
HEALTH RISK ASSESSMENTS				
Cost per HRA (paper or online)				
Other vendor fees				
Incentive per participant				
Other (giveaways or food)				

BIOMETRIC SCREENINGS				
Cost per screen				
Other vendor fees				
Incentive per participant				
Other (giveaways or food)				
HEALTH COACHING				
Cost per participant				
Other vendor fees				
Other (giveaways or food)				
HEALTH EDUCATION PRESENTATIONS ("LUNCH AND LEARNS")				
Cost per presentation				
Other vendor fees				
Other (giveaways or food)				
HEALTH EDUCATION LITERATURE				
Brochures (for brochure rack)				
Books (for lending library)				
Newsletters				
WEB PORTAL VENDOR				
(customized employee wellness website)				
Vendor fees				
EMPLOYEE FLU SHOTS				
Cost per shot				
Other vendor fees				
Other (giveaways or food)				
CAMPAIGN MATERIALS				
<u>Quarter 1 Event</u>				
(program manual & materials)				
(incentives/prizes/giveaways)				
(other)				
<u>Quarter 2 Event</u>				
(program manual & materials)				
(incentives/prizes/giveaways)				
(other)				
<u>Quarter 3 Event</u>				
(program manual & materials)				
(incentives/prizes/giveaways)				
(other)				
<u>Quarter 4 Event</u>				
(program manual & materials)				
(incentives/prizes/giveaways)				
(other)				
ONSITE FITNESS SERVICES				
Fitness class(es)				
Personal trainer(s)				
Fitness equipment				
Equipment maintenance				
Liability insurance				
OTHER				
Table Cloth for Events				
Brochure racks				
Book shelves				
Blood Pressure Machine(s)				
Other				