



California Rural Healthcare Transformation (CalRHT) Initiative 1: Transformative Care Model Accelerator Partners

Budget Workbook for Applicants

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“A healthier California where all receive equitable, affordable, and quality health care.”

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Attachment A - Budget workbook

This budget workbook is intended to support the applicant’s response to the Request for Application (RFA) for the California Rural Healthcare Transformation (CalRHT).

Applicants will use the RFA application to submit their proposed project narrative, including the activities, modules, and initiatives they are seeking funding to implement. As part of the RFA, applicants should complete this workbook to provide an itemized budget by cost category, identify the basis for each cost estimate, and explain how each proposed cost supports the project activities described in the application. The workbook should be consistent with the applicant’s proposed project, the applicant’s project narrative, and any applicable state and federal funding requirements.

Applicants may propose a project with more than one module (also called sub-program or initiative). For example, an application may include one module focused on increasing colorectal cancer screenings and another focused on improving access to first -trimester prenatal care. If an applicant proposes multiple modules, the budget workbook should include budget detail for each proposed module, including the requested funding amount, cost categories, and cost explanations.

If an applicant is selected to receive funding, the applicant may be required to provide additional details regarding their proposed budget before funding is awarded. California Department of Health Care Access and Information (HCAI) reserves the right to negotiate the terms of funding or to determine not to fund an applicant in response to this additional information.

HCAI also reserves the right to fund only a subset of modules. For that reason, applicants should ensure the budget workbook clearly shows the costs associated with each module, rather than only providing a single combined project budget.

Definitions for budget categories

- **Personnel:** Salaries and wages for applicant staff who will work directly on the proposed project (e.g., project manager, program lead, data analyst)

- **Fringe Benefits:** Non-salary / non-wage compensation provided to staff listed under Personnel (e.g., payroll taxes, health insurance, retirement contributions, workers' compensation)
- **Travel:** Travel costs for staff listed under Personnel only, when needed to carry out the project (e.g., mileage, lodging, parking for project-related site visits or meetings)
 - Note: Travel for consultants should be placed in the "Contractual" category
 - Note: Travel for other participants, advisory committee members, review panel members, etc. should be placed in the "Other" category
- **Equipment:** Tangible nonexpendable personal property, including exempt property, charged directly to the award having a useful life of more than one year and an acquisition cost of \$10,000 or more per unit (e.g., telehealth equipment)
- **Supplies:** Tangible personal property with an acquisition cost of less than \$10,000 per unit (e.g., office supplies, software licenses)
- **Contractual:** Costs for consultants and / or other subrecipients that will provide services or complete work for the project (e.g., training providers, implementation partners)
- **Other:** Direct project costs that do not fit into the categories above but are still necessary for the project (e.g., meeting costs, travel costs for participating entities that are not the lead Applicant Entity)
- **Indirect Charges:** Shared organizational costs that support the grant but cannot be easily tied to a specific project activity or direct cost category (e.g., accounting, payroll, human resources, general administration, utilities, office space).

Additional guidance provided by the Centers for Medicare & Medicaid Services (CMS) can be found here: <https://www.cms.gov/about-cms/work-us/cms-grants-cooperative-agreements/how-apply-cms-grants/cms-guidance-preparing-budget-request-narrative>

Table 1: Proposed Total Budget

This table summarizes the applicant's total proposed project budget by module and budget category. Applicants should use this table to show how total requested Accelerator Partner funding is distributed across proposed project modules and across standard budget categories, including personnel, fringe benefits, travel, equipment, supplies, contractual costs, other direct costs, and indirect charges. The table should align with the total funding request listed in the Request for Application (RFA) and with the more detailed cost information provided in the personnel and budget explanation tables.

Directions

For each proposed project module, applicants should complete the following steps:

1. Insert the name of the proposed project module into each column header
2. Enter the proposed cost for each budget category across all modules.
 - a. If there are no expenses for a given budget category, enter 0
 - b. Personnel costs should be calculated using Table 2 and carried forward into the Personnel row of Table 1
3. Calculate the total cost for each budget category across all modules
4. Calculate the total cost for each module across all budget categories
5. Confirm that the total proposed budget in Table 1 matches the total funding requested in the RFA application

If the applicant has fewer modules than the available columns, leave the remaining columns blank. If the applicant has more modules than available columns, add additional columns as needed.

If a cost supports multiple modules, applicants should allocate the cost across the relevant modules (e.g., if a Project Manager is supporting two modules, the Project Manager’s costs should be divided by two and reflect across both initiatives).

Example Table 1: Proposed Total Budget

| Budget Category | Telehealth Expansion | Mobile Clinic Outreach | <i>[Insert module name here]</i> | <i>[Insert module name here]</i> | Total |
|------------------------|-----------------------------|-------------------------------|----------------------------------|----------------------------------|------------------|
| Personnel | \$242,500 | \$200,000 | | | \$442,500 |
| Fringe Benefits | \$72,750 | \$60,000 | | | \$132,750 |
| Travel | \$5,000 | \$12,000 | | | \$17,000 |
| Equipment | \$50,000 | \$30,000 | | | \$80,000 |
| Supplies | \$10,000 | \$8,000 | | | \$18,000 |
| Contractual | \$25,000 | \$15,000 | | | \$40,000 |
| Other | \$3,000 | \$2,000 | | | \$5,000 |
| Indirect Charges | \$15,000 | \$10,000 | | | \$25,000 |
| Total | \$423,250 | \$337,000 | | | \$760,250 |

Table 1: Proposed Total Budget

| Budget Category | <i>[Insert module name here]</i> | <i>[Insert module name here]</i> | <i>[Insert module name here]</i> | <i>[Insert module name here]</i> | Total |
|------------------------|----------------------------------|----------------------------------|----------------------------------|----------------------------------|--------------|
| | | | | | |

| | | | | | |
|------------------|--|--|--|--|--|
| Personnel* | | | | | |
| Fringe Benefits | | | | | |
| Travel | | | | | |
| Equipment | | | | | |
| Supplies | | | | | |
| Contractual | | | | | |
| Other | | | | | |
| Indirect Charges | | | | | |
| Total | | | | | |

**To complete personnel budget category please refer to Table 2*

Note: Table 1 is based on the budget categories included in Section 6 of Standard Form 424A (SF-424A) for federal grant applications

Table 2: Proposed Personnel Costs

This table captures the proposed personnel costs for each project module. Applicants should use this table to identify each staff position that will be supported by grant funds, including the staff member’s name if known, annual salary, percent of time dedicated to the project, number of months budgeted, and total salary amount requested. The total personnel amount from Table 2 should be carried forward into the Personnel row of Table 1 for the applicable module.

Directions

Applicants should complete a separate personnel table for each project module and complete the following steps:

1. For each requested position, provide the following information:
 - a. **Position title:** The title of the staff position to be funded.
 - b. **Name:** The name of the staff member, if known. If the position is not yet filled, enter “Vacant” or “TBD.”
 - c. **Annual salary:** The annual salary for the position.
 - d. **Time dedicated to project:** The percentage of the position’s time that will be dedicated to the proposed project.
 - e. **Months budgeted:** The number of months of salary requested.
 - f. **Salary requested:** The total salary amount requested from grant funds. This may be less than the full salary if position is already partially funded
2. Applicants should calculate the total salary requested for each project module and enter that amount in the “Total” row. The total should then be carried forward into Table 1 and entered into the Personnel row.

If the applicant has fewer modules than the available columns, leave the remaining columns blank. If the applicant has more modules than available columns, add additional columns as needed.

If personnel costs support multiple modules, applicants should allocate the cost across the relevant modules and briefly explain the allocation approach in Table 3 below.

Example Table 2: Proposed Personnel Costs for Telehealth Expansion Module

| Position Title | Name | Annual Salary | Time Dedicated | Months Budgeted | Salary Requested |
|-----------------|-------------|---------------|----------------|-----------------|------------------|
| Project Manager | Alice Chen | \$130,000 | 50% | 12 months | \$65,000 |
| IT Specialist | Vacant | \$125,000 | 100% | 12 months | \$125,000 |
| Data Analyst | Mario Lopez | \$105,000 | 50% | 12 months | \$52,500 |
| Total | | | | | \$242,500 |

Table 2: Proposed Personnel Costs for [Insert module name here]

| Position Title | Name | Annual Salary | Time Dedicated | Months Budgeted | Salary Requested |
|----------------|------|---------------|----------------|-----------------|------------------|
| | | | | | \$ |
| | | | | | \$ |
| | | | | | \$ |
| Total | | | | | \$ |

Table 2: Proposed Personnel Costs for [Insert module name here]

| Position Title | Name | Annual Salary | Time Dedicated | Months Budgeted | Salary Requested |
|----------------|------|---------------|----------------|-----------------|------------------|
| | | | | | \$ |
| | | | | | \$ |
| | | | | | \$ |
| Total | | | | | \$ |

Table 2: Proposed Personnel Costs for [Insert module name here]

| Position Title | Name | Annual Salary | Time Dedicated | Months Budgeted | Salary Requested |
|----------------|------|---------------|----------------|-----------------|------------------|
| | | | | | \$ |
| | | | | | \$ |

| | | | | | |
|--------------|--|--|--|--|----|
| | | | | | \$ |
| Total | | | | | \$ |

Table 2: Proposed Personnel Costs for [Insert module name here]

| Position Title | Name | Annual Salary | Time Dedicated | Months Budgeted | Salary Requested |
|----------------|------|---------------|----------------|-----------------|------------------|
| | | | | | \$ |
| | | | | | \$ |
| | | | | | \$ |
| Total | | | | | \$ |

Table 3: Proposed Budget Details

This table provides narrative explanations for the proposed costs listed in Table 1. Applicants should use this table to briefly describe what each category of funding will support for each project module, including fringe benefits, travel, equipment, supplies, contractual costs, other direct costs, and indirect charges. The explanations should demonstrate how each proposed cost is necessary for project implementation and how it supports the activities described in the RFA application.

Directions

Insert module name in field above table

For budget category in each module complete the following steps:

1. Provide a brief explanation of what the requested funding will support.
2. Include enough detail to show how the cost was estimated and why it is necessary.
3. If a cost supports multiple modules, describe how the cost was allocated across modules.

If the applicant has fewer modules than the available columns, leave the remaining columns blank. If the applicant has more modules than available columns, add additional columns as needed.

Note: Applicants do not need to repeat the personnel detail provided in Table 2 but should ensure that all non-personnel costs listed in Table 1 are explained in Table 3.

Example Table 3: Proposed Budget Details for Telehealth Expansion

| Budget Category | Explanations of costs |
|------------------------|--|
| Fringe Benefits | Fringe benefits are calculated at 30% of personnel costs, or \$72,750, to cover payroll taxes, health insurance, retirement contributions, workers' compensation, and other standard employee benefits for California-based staff. |
| Travel | Local travel to participating provider sites for implementation support, workflow assessment, and project coordination meetings |
| Equipment | Telehealth carts, monitors, peripheral devices, secure connectivity equipment, and durable technology required to support virtual care delivery |
| Supplies | Software licenses, minor technology supplies, patient education materials, and office supplies needed to support telehealth implementation |
| Contractual | Contracted implementation consultant to support telehealth platform configuration, workflow design, and staff training |
| Other | Community partner meeting costs, community partner convenings, and other direct project costs that do not fit within the standard cost categories above |
| Indirect Charges | Prorated indirect costs for accounting, payroll, and human resources required to manage the grant (e.g., the annual salary for an employee who contributes 9 months of time toward the Accelerator Partners grant would be pro-rated for those 9 months rather than the full year) |

Table 3: Proposed Budget Details for [insert module name here]

| Budget Category | Explanations of costs |
|------------------------|------------------------------|
| Fringe Benefits | |
| Travel | |
| Equipment | |
| Supplies | |
| Contractual | |
| Other | |
| Indirect Charges | |

Table 3: Proposed Budget Details for [insert module name here]

| Budget Category | Explanations of costs |
|------------------------|------------------------------|
| Fringe Benefits | |
| Travel | |
| Equipment | |
| Supplies | |
| Contractual | |
| Other | |
| Indirect Charges | |

Table 3: Proposed Budget Details for [insert module name here]

| Budget Category | Explanations of costs |
|------------------------|------------------------------|
| Fringe Benefits | |
| Travel | |
| Equipment | |
| Supplies | |
| Contractual | |
| Other | |
| Indirect Charges | |

Table 3: Proposed Budget Details for [insert module name here]

| Budget Category | Explanations of costs |
|------------------------|------------------------------|
| Fringe Benefits | |
| Travel | |
| Equipment | |
| Supplies | |
| Contractual | |
| Other | |
| Indirect Charges | |