Guide to Using the PrEP into FP Cost Estimation Template

This guide will provide detailed sheet by sheet instructions for how to complete the PrEP into FP Cost Estimation template.

Cover Sheet

This sheet is designed to capture information on the PrEP into FP model from the various partner organization and county health officials being interviewed (you will use a separate template for each partner organization / county health team). There is also a space to include any notes that you feel will help in the interpretation of the data reported in the template.

For this sheet, we need you to:

- ☐ In Cell B10, type the name of the partner organization being interviewed.
- ☐ In Cell B12, add any explanatory notes you wish to include in your submission.

Scope

This sheet is designed to capture information on those service delivery points the partner organization or county health team supports in the provision of the PrEP into FP model. You should notice that in Cell A1 the partner organization name will automatically complete based on the data you filled in on the Cover Sheet. We will use the information on this sheet to help allocate shared costs across different geographies and service delivery points within a geography.

For this sheet you need to:

- ☐ Complete one row for <u>each county</u> the partner organization is/was actively engaged in supporting for the introduction of and/or provision of the PrEP into FP model. Please note that if the row total in columns D:G does not match with the value in Column C, the shading in Column C will be yellowish and the font color will be red. This will help you identify any missing or inconsistent data.

Activity Identification

As mentioned on the cover sheet, the approach to costing we will be using is called <u>Activity-Based Costing.</u> To do this, we begin by identifying the activities your organization was engaged in either to: a) introduce the PrEP into FP model, and/or b) support the delivery of the PrEP into FP model.

For this sheet you will need to:

1) Work through the section beginning in row 3 focused on the up-front or preparation activities necessary to introduce the PrEP into FP model.

- ☐ In column G row 6:12 indicate if the partner organization was involved in the activity listed (rows 10-12 are used to add any activities not reflected in rows 6-9). If the partner organization was involved in an activity, enter “Y” in column G for that activity. If partner was not involved enter “N” in column G.
- ☐ For any row where column G has a “Y” entered, please enter the approximate start month-year and stop month-year in columns H & I respectively (use 2 digits for month/4 digits for year).

2) Work through the section beginning in row 15 focused on those on-going or recurring activities related to the PREP INTO FP model provision

- ☐ In column G row 18:26 indicate if the partner organization was involved in the activity listed (rows 24-26 are used to add any activities not reflected in rows 18-23). If the partner organization was involved in an activity, enter "Y" in column G for that activity. If partner was not involved enter "N" in column G.
- ☐ For any row where column G has a "Y" entered, please enter the expected frequency at which this activity takes place in column H.

3) Now that you have identified the activities for which the partner organization was involved in related to the PREP INTO FP model, you are asked to provide details on the resources used to carry out each specific activity. In column A you will see hyperlinks for Activity No. which will take you to the appropriate sheet for that specific activity. You will need to work through those sheets one-by-one for each activity with a "Y" in column G.

E-# Detail Sheets

These sheets are used to record the details on the resources used to support specific activities related to the establishment of the PREP INTO FP model. The header on this sheet will automatically transfer the information on the description of the activity as well as the specific model and partner organization upon which you are reporting. The data from the Start MM-YYYY and Stop MM-YYYY will also be auto populated from the Activity Identification Sheet.

For this sheet you will need to begin by identifying ***staff from the partner organization*** engaged in this activity

- ☐ Cells B16:B25 are used to list cadres of staff who were involved (do not list individuals by name)
- ☐ For each row where you have identified a staff cadre as being involved, in column C list the number of persons in that cadre who were involved.
- ☐ Keeping in mind the start and stop periods for the activity, and the number of persons within the staff cadre, estimate the ***total hours*** of effort contributed by that cadre. You might think about what level of effort was required over that period and convert to hours based upon a typical 40-hour work week. For example: If there are 3 persons involved over a two month period (8 weeks) at 10% effort (1/2 day per week). We would estimate: .10 LOE x 8 weeks x 40 hour/wk x 3 persons = 96 hours which would be reported in column D for that cadre.
- ☐ Complete this estimation exercise in Column D for any row with staff cadres listed in rows 16:25
- ☐ We also want to know where these staff members come from by county (columns F:I). Again, the values in Column C will be formatted in red font with a yellow background if data is incomplete or inconsistent.

Finally, for these sheets we want to know about any other resources ***provided by the partner organization*** that might have been required to carry out this activity. We have prepopulated a list of resources in cells B31:B41 and included space in rows 42:46 to list other resources.

☐ For any of the prepopulated resources *provided by the partner organization*, indicate the quantity used in Column C (noting the unit listed in column D).
☐ For any additional resources *provided by the partner organization*, indicate the quantity used in Column C and the metric for measuring this resource in column D.

This completes the data requirements for an Establishing Activity. You can use the hyperlink in Cell G3 to return to the Activity Identification sheet to move on to any remaining Establishing Activities this partner organization supported.

E-Detail (blank) Sheet: If you added any additional establishing activities on the Activity Identification worksheet, you will need to use the E-Detail (blank) sheet to complete a detailed resource identification exercise for that activity. The logic/process is the same as for the pre-provided sheets, but you'll need to complete a few additional fields which are not prepopulated.

S-# Detail Sheets

These sheets are used to record the details on the resources used to support specific activities related to the sustaining of the PREP INTO FP model. ***Here we are focused on resources used in a typical month***. The header on this sheet will automatically transfer the information on the description of the activity as well as the specific model and partner organization upon which you are reporting.

For this sheet you will need to begin by identifying *staff from the partner organization* engaged in this activity

- ☐ Cells B12:B21 are used to list cadres of staff who were involved (do not list individuals by name)
- ☐ For each row where you have identified a staff cadre as being involved, in column C list the number of persons in that cadre who were involved.
- ☐ Keeping in mind the frequency at which this activity occurs (shown in cell D9 from the activity identification worksheet), and the number of persons within the staff cadre, estimate the ***total hours*** of effort contributed by that cadre ***in a typical month***[1]. You might think about what level of effort was required and convert to hours based upon a typical 40-hour work week. For example: If there are 3 persons involved @ 25% effort (10 hours per week). We would estimate: .25 LOE x 4 weeks/mo x 40 hour/wk x 3 persons = 120 hours which would be reported in column D for that cadre.
- ☐ Complete this estimation exercise in Column D for any row with staff cadres listed in rows 12:21

[1] For activities that are less frequent than a month, if you know the resources required, you can deflate to a monthly value. For example, for a bimonthly activity, you can divide by 2, for quarterly, divide by 4, for semi-annual divide by 6 and for annual activities divide by 12. For more frequent activities, if you know how much is used for the shorter period, can inflate to a monthly amount. For daily can multiply by 22, for weekly, can multiply by 4.25, for biweekly can multiply by 2.

☐ For each staff cadre we also want to know where these staff members come from by location or level within the health system (columns F:I). Again, the values in Column C will be formatted in red font with a yellow background if data is incomplete or inconsistent.
☐

Finally, for these sheets we want to know about any other resources *provided by this partner organization* that might have been required to carry out this activity in a typical month. We have prepopulated a list of resources depending upon the activity in cells B27:B40 and included space to list other resources.
☐ For any of the prepopulated resources *provided by this partner organization*, indicate the quantity used ***per month*** in Column C (noting the unit listed in column D). Also, please use columns F:I to indicate where these resources were used for this activity.
☐ For any additional resources *provided by this partner organization*, indicate the quantity used ***per month*** in Column C and the metric for measuring this resource in column D. Also, please use columns F:I to indicate where these resources were used for this activity.

This completes the data requirements for a Sustaining Activity. You can use the hyperlink in Cell G3 to return to the Activity Identification sheet to move on to any remaining Sustaining Activities the partner organization supported.

S-Detail (blank) Sheet: If you added any additional sustaining activities on the Activity Identification worksheet, you will need to use the S-Detail (blank) sheet to complete a detailed resource identification exercise for that activity. The logic/process is the same as for the pre-provided sheets, but you'll need to complete a few additional fields which are not prepopulated.

Service Time Est. Tab

This sheet is used to collect additional details about how the PREP INTO FP model being reported upon provides FP services to clients. On the S-2, S-3, S-4, S-5, and/or S-6 Detail sheet, you identified the partner organization staff that were involved in the provision of the PREP INTO FP model and their location across the health system. This tab uses the information from that sheet to list the identified staff cadres and the locations where those staff are located. Whenever that occurs a cell on this sheet will be filled with green. It is these cells for which additional information is sought.

For this sheet you will need to:

1) For every green shaded cell in a row, please estimate for that combination of cadre and health system level how much time a member of that staff cadre spends with a client per encounter (in minutes).
2) If a member of that cadre is not in direct contact with the client at a given level of the health system, please enter 0 (rather than leave the cell blank) so we will know that you have considered this issue.

Note: Time with a client by a cadre member may well vary by health system level as caseloads will vary with level and the availability of other staff members to assist with client services changes as the level of the health system changes.

Resource Valuation Tab

This last sheet will be used to assign unit values to the resources identified as having been used by the partner organization on the E-# Detail and S-# Detail sheets. The sheet will be auto populated with any resources you have identified, and their quantity from those sheets. The sheet has been formatted to capture any possible data from those sheets so, as a result, there will be many blank rows or rows with pre-named resources for which quantity used =0.

It is recommended that you work closely with someone from the partner organization's finance or accounting team to complete this worksheet.

For this sheet you need to:

☐ Follow the instructions in cell J3 to help identify those resources for which a unit value will need to be estimated

For those resources where the quantity used is >0, we will need to know:

☐ what unit value is appropriate to use,

☐ the currency unit in which this unit value is being reported (local currency unit or USD),

☐ who pays for this resource, and

☐ any source that was used to identify this unit value. The source could be an invoice, a budget document, a government circular, a vendor, etc.