Guide to Using HIP Cost Estimation Template

This guide will provide detailed sheet by sheet instructions for how to complete the HIP Cost Estimation template. This will be an iterative process with some data completed in collaboration with the study team and some completed by the reporting organization working alone. Initially, the reporting organization program staff will work with the study team. In a later meeting, the study team will work with the reporting organization's finance staff to assign appropriate values to resources identified through this exercise. ***You will use a separate template (workbook) for each HIP your organization reports on.***

Cover Sheet

This sheet is designed to capture information on the HIP service that you will be reporting on (you will use a separate template for each HIP your organization reports on), and the name of your organization. Your organization should report on: 1) any HIP service that you helped to introduce, 2) any HIP service you are directly implementing, or 3) any HIP service that you are supporting other group(s) to implement. 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 C3, type the name of the High Impact Practice (HIP) service you will be reporting on in this workbook.
- ☐ In Cell B12, type the name of your organization.
- ☐ In Cell B14, add any explanatory notes you wish to include in your submission.

Activity Identification

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

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 HIP service.
   - ☐ In Column G row 6:13 indicate if your organization was involved in the activity listed (rows 11-13 are used to add any activities not reflected in rows 6-10). If your organization was involved in an activity, enter "Y" in column G for that activity.
   - ☐ 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. *Note: Be sure to enter as "mm/yyyy" using 2 digits to represent the month and 4 digits to represent the year. If you only use 2 digits for the year it will think you are entering the day of the month and default to "2021" as the year.*
2) Work through the section beginning in row 16 focussed on those on-going or recurring activities related to the HIP service provision
   - ☐ In Column G row 19:25 indicate if your organization was involved in the activity listed (rows 23-25 are used to add any activities not reflected in rows 19-22). If your organization was involved in an activity, enter "Y" in column G for that activity.

- ☐ 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 your organization was involved related to this HIP service, 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 HIP service. The header on this sheet will automatically transfer the information on the description of the activity as well as the specific HIP upon which you are reporting. Remember: If your organization is supporting more than one of our selected HIPS, you will need to complete a separate workbook for each HIP. 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 your organization* engaged in this activity
Note: If the organization reporting is the MoH, they should skip to the next section (rows 31-40).

- ☐ Cells B16:B25 are used to list cadres of *staff from your organization* 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% level of effort (LOE) (1/2 day per week). We would estimate: 0.10 LOE x 8 weeks x 40 hour/week 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

You will next be asked to repeat this exercise for staff from the MoH (rows 31-40) or staff from the community/civil society organizations (rows 46-55). Keep in mind, *do not list individuals by name but by cadre*.

☐ For the Community / Civil Society Orgs section, we also want to know in Column E, what group they belong to.

Finally, for these sheets we want to know about any other resources *provided by your organization* that might have been required to carry out this activity. We have prepopulated a list of resources in Cells B61:B71 and included space in Rows 72:76 to list other resources.

☐ For any of the prepopulated resources *provided by your organization*, indicate the quantity used in Column C (noting the unit listed in Column D).

☐ For any additional resources *provided by your 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 your 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 HIP service. ***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 HIP upon which you are reporting. Remember: If your organization is supporting more than one of our selected HIPS, you will need to complete a separate workbook for each HIP.

For this sheet you will need to begin by identifying *staff from your organization* engaged in this activity.
Note: if the organization reporting is the MoH, they should skip to the next section (rows 27-36).

- ☐ 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, generated from information entered in Column H on 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: 0.25 LOE x 4 weeks/month x 40 hour/week 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

You will next be asked to repeat this exercise for staff from the MoH (Rows 27-36) or staff from the community/civil society organizations (Rows 42-51). Keep in mind, *do not list individuals by name but by cadre*.

☐ For the Community / Civil Society Orgs section, we also want to know in Column E, what group they belong to.

Note: For the S-2 Detail Sheet only, for any staff identified as providing the HIP service to clients, we need to ask where the staff are located within the health system and report this in Columns F:O. Similarly

[1] For activities that are less frequent than monthly, if you know the resources required, you can deflate to a monthly value. For example, for a bimonthly activity, you can divide amount by 2, for quarterly, divide amount by 4, for semi-annual divide amount by 6 and for annual activities divide amount 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 amount, can multiply by 20; for weekly amount, can multiply by 4, for biweekly amount can multiply by 2.

for any supplies identified in rows 57:65, we need an estimate of where they are used within the health system.

Finally, for these sheets we want to know about any other resources *provided by your organization* that might have been required to carry out this activity in a typical month. We have pre-populated a list of resources depending upon the activity in Cells B57:B65 and included space to list other resources.

☐ For any of the prepopulated resources *provided by your organization*, indicate the quantity used ***per month*** in Column C (noting the unit listed in Column D).

☐ For any additional resources *provided by your organization*, indicate the quantity used ***per month*** in Column C and the metric for measuring this resource in Column D.

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 your 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 HIP service being reported upon is provided to clients. On the S-2 Detail sheet, the respondent identified the MoH and Community/Civil Society Organization staff that were involved in the provision of the HIP service 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 typical member of that staff cadre spends *(in minutes)* with a client per encounter. For example, if a clinic officer spends 2.5 hours per day providing the HIP service and sees 10 clients, the time per client would be estimated as: (2.5 hours X 60 minutes/hour) ÷ 10 clients = 15 minutes/client
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. ***Therefore, it is to be expected that time estimates will vary across the row for any staff cadre as level of the health system changes from Column to Column.***

Resource Valuation Tab

This last sheet will be used to assign unit values to the resources identified as having been used by your 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 your 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 *(Column D)* 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.