



Costing Worksheet (Team-Based Cost Planning and Economic Evaluation Tool)

1. Quick Cost Reality Check

Who is most likely to care about the costs of this project? (e.g., patients, clinicians, clinic leaders, health systems, payers, policymakers) **How will these people want the cost information communicated to them?**

Which stages are important to represent (Engagement, Design, Implementation, Dissemination and Scale-up)?

Approximately how much time, from which staff members do you think this project will require? Are there other significant expenses to the intervention (e.g. equipment, licensing)? Are these realistically possible?

What cost-related decisions might this project inform? (e.g., adoption, funding, scale-up, sustainment, replication)

Note: A rough estimate is often enough to start. The goal is to identify whether costs may be important to key decision-makers.

2. Do You Need a Formal Costing Analysis?

Do you want or need to formally measure costs or value as part of this project?

☐ No — estimates of time and cost are sufficient

☐ Maybe — we need more discussion

☐ Yes — detailed/comprehensive economic evaluation & analysis (Cost Effectiveness, Business Impact, etc.) is important. You should check this box if you want to publish on this costing or use as data from a grant.

Note: Not every project needs a formal economic evaluation. Consider whether cost information will influence decisions about implementation, sustainment, or spread.

3. Whose Perspective: Purpose and Audience

Who will use these results and what decisions will they make?

Note: Costing should be designed around the needs of decision-makers.

Then Whose perspective are you taking in estimating costs- see list below?



- ☐ Patient/Participant
- ☐ Clinician/Provider
- ☐ Health System/Organization
- ☐ Payer/Insurer
- ☐ Community/Society
- ☐ Other: _____

What costs matter most from that perspective?

Note: Different stakeholders value different costs and benefits.

5. What Costs Should Be Included?

What resources are required to implement or sustain the intervention? Usually these are primarily staff time

Which costs should be excluded because they are research-only activities?

Note: Focus on costs someone would incur when replicating the program outside the research study.

7. Collecting Costs and Feasibility

How will cost information be collected? (You may need to combine methods)

- ☐ Existing budget/accounting data
- ☐ Staff time logs
- ☐ Surveys
- ☐ Interviews
- ☐ Observation
- ☐ Other: _____

Who will lead the costing effort? Do you have access to a costing, finance, or economics expert?

Note: Choose the most precise approach your team can realistically support.

8. Next Steps

After considering these issues, what level of costing is appropriate?

- ☐ No formal costing
- ☐ Basic implementation costing
- ☐ Budget impact analysis
- ☐ Return on investment analysis



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- ☐ Cost-effectiveness analysis
- ☐ Other: _____

Key action items and responsible team members:

Note: Before collecting data, make sure the team agrees on the purpose, audience, perspective, and scope of the costing effort.