Chronic Disease Self-Management Cost Calculator
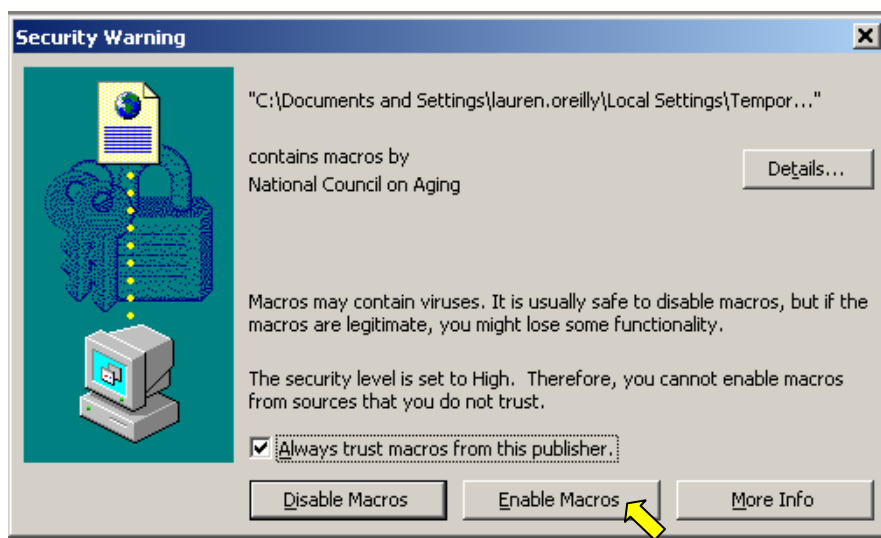## Overview and Instructions
February 2010

About the Calculator

The National Council on Aging (NCOA) sponsored The Lewin Group, Inc. (Lewin) to develop this Calculator to help organizations better understand and manage the costs of administering their Chronic Disease Self Management Programs (CDSMP). By entering your organization's costs and CDSMP program data, you can use the Calculator to produce estimated "per participant" and "per workshop" costs, as well as evaluate the impact of individual program components on your total expenses. We encourage organizations to use this Calculator to deliver your programs in an efficient manner, and at a reasonable cost.

The Calculator will work for all community-based, CDSMP-related programs: the Positive Self-Management Program (HIV), and English and Spanish versions of Chronic Disease, Arthritis, and Diabetes Self-Management Programs. To use this Calculator, you will need to assemble all of your costs: CDSMP Personnel/Program Administration; Marketing and Recruitment; Master and Workshop Leader Training; and CDSMP Workshop. Various program costs can be saved individually on your computer and printed, so you can compare different strategies and targets.

Getting Started with the Calculator: Excel 2003[1]

1. **Trusting macros.** The CDSMP Calculator is powered by macros that are signed with a digital certificate from VeriSign, Inc. This verifies that the code contained in this Calculator has been created by the National Council on Aging and has been certified by VeriSign, Inc. as a legitimate producer of code. When you open the Calculator, Excel will ask if you want to enable macros in the document:
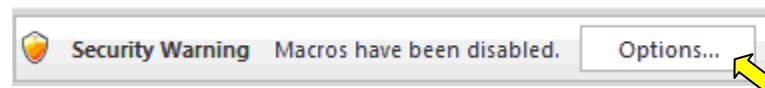

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[1] The calculator was developed in Microsoft Excel and operates with a Visual Basic interface. Because the calculator is in Excel, it may not function for a user who does not operate in a Microsoft environment.

If you also click the "Always trust macros from this publisher" option, you'll be able to use the Calculator without being asked each time that you create or open the document. We strongly recommend selecting this option.
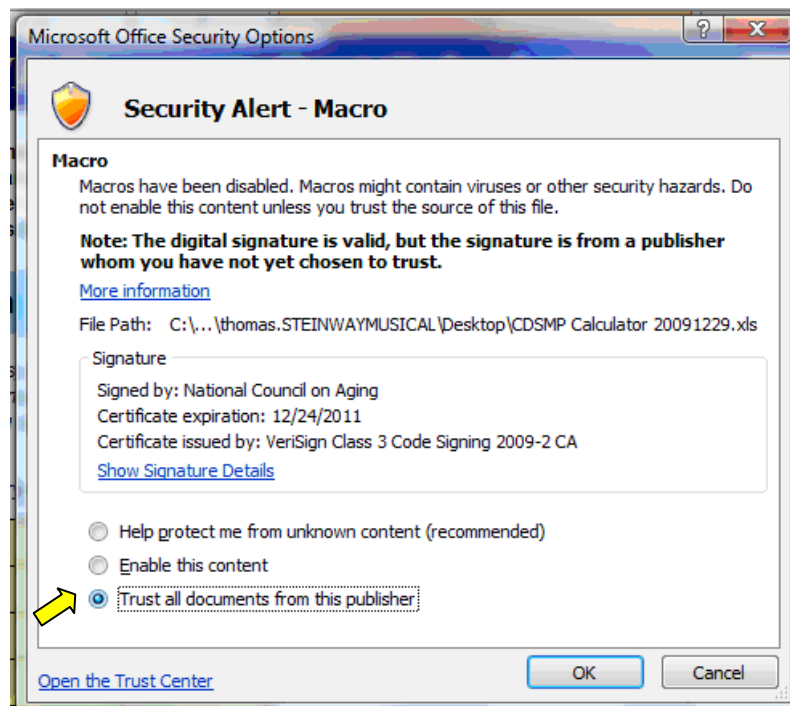
2. **Save the Calculator to Your Desktop or to a File Folder**. Before you start working in the calculator, please save the calculator to your desktop or a file folder.

3. **Go to the Welcome Tab**. When you open the Excel file, it should automatically take you to the **Welcome** tab.

Getting Started with the Calculator: Excel 2007[2]

1. **Trusting macros.** The CDSMP Calculator is powered by macros that are signed with a digital certificate from VeriSign, Inc. This verifies that the code contained in this Calculator has been created by the National Council on Aging and has been certified by VeriSign, Inc. as a legitimate producer of code. When you open the Calculator, Excel will display a message in the upper left toolbar:

If you click on "Options…" you will see the following message:

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[2] The calculator was developed in Microsoft Excel and operates with a Visual Basic interface. Because the calculator is in Excel, it may not function for a user who does not operate in a Microsoft environment.

If you click the "Trust all documents from this publisher" option, you'll be able to use the Calculator with macros without having to verify your settings each time that you create or open the document. We strongly recommend selecting this option.

2. **Save the Calculator to Your Desktop or to a File Folder**. Before you start working in the calculator, please save the calculator to your desktop or a file folder.

3. **Go to the Welcome Tab**. When you open the Excel file, it should automatically take you to the **Welcome** tab.

Cost Calculator

To get started with the calculator, you will need all of your costs for the past year. This includes the costs of all personnel connected with CDSMP (both workshop leaders and administration of the program), indirect costs, training for workshop leaders, master trainings, the workshops themselves, and related program promotion.

Cells highlighted in yellow and notes fields can be changed by the user.

The Calculator is pre-loaded with example cost and program data. To clear the Calculator inputs and set all values to zero (0), click the "**Clear Input Data**" button located at the top of the Calculator. To reload the example data, click "**Load Example Data.**"

CDSMP Personnel and Program Administration

- ▪ <u>Number of Full-Time Equivalents (FTE)</u>: The number of full-time equivalent (FTE) employees you have working per staff position. This may be a whole number or a fraction. For example, if your FTE is equal to 40 hours a week and you have two people who each work 30 hours a week as Program Directors, you should answer that you have 1.5 FTE Program Directors. One individual's time may be attributed to different categories as appropriate. For example, if you have a staff member who works 20 hours

a week as a Volunteer Coordinator and also spends 20 hours a week as a Wellness Manager, you should attribute 0.5 FTE to Volunteer Coordinator and 0.5 FTE to Wellness Manager.

▪ Salary: Regular wages received by an employee from an employer on a regular basis.

▪ Fringe Benefit Percentage: Non-salary employee compensation expressed as a percentage of salary. Fringe Benefits may include vacation, holidays, sick leave, workers compensation, social security and retirement benefits.

▪ CDSMP Personnel and Program Administration: The number of FTE (paid staff, volunteers, and contractors) that perform CDSMP management, administration or program coordination. This includes such tasks as:

❖ *determining locations, dates and times of classes;*
❖ *updating websites, fliers and brochures;*
❖ *workshop leader recruitment;*
❖ *establishing relationships with partner organizations;*
❖ *fundraising;*
❖ *on-going marketing and program promotion;*

❖ *recruiting participants and supporting retention;*
❖ *assisting in setting up workshops;*
❖ *providing support to leaders;*
❖ *tracking participation; and*
❖ *monitoring quality and fidelity and documenting outcomes.*

Since job titles and descriptions vary by organization, there is space for you to enter up to six (6) paid staff positions, four (4) volunteer positions, and two (2) contractor positions. Please indicate whether contractors are paid an hourly rate or a flat fee.

▪ CDSMP Workshop Leader: Health professionals or lay persons (peers) with one or more chronic conditions who facilitate the six-week CDSMP workshop class using a detailed scripted manual.

▪ Annualized Cost of CDSMP License: The annualized cost to obtain the Stanford University CDSMP licensure. The cost of a license is determined by how many programs your organization plans to offer each year.

❖ *$500 license for up to 10 workshops per year*
❖ *$800 license for up to 20 workshops per year*
❖ *$1000 license for up to 30 workshops per year*
❖ *Fees vary for more than 30 workshops*

▪ Other Costs: Any other cash or in-kind expenses related to CDSMP personnel and program administration that are not otherwise captured.

Indirect Costs

- ▪ <u>Total Indirect Costs</u>: Overhead costs incurred in the overall functioning of the organization that are not readily identified as direct project expenditures. This may include rent, utilities, general administration expenses, etc.

- ▪ <u>Indirect Cost Rate</u>: The percentage of indirect costs borne by the CDSMP Program. The default value is 30%.

Marketing and Program Promotion

- ▪ The costs associated with recruitment and marketing to participants, lay leaders, partners, and funders. This includes postage, advertisements, and mailing list purchases. If possible, estimate the dollar amount associated with any in-kind contributions.

Workshop Leader Training
- ▪ <u># of Workshop Leader Trainings conducted</u>: The number of workshop leader trainings your organization conducted in the past year.

- ▪ <u># of Follow-up Sessions conducted</u>: The total estimated cost of all follow-up trainings and/or networking sessions (e.g., annual in-service, continuing education) conducted in the past year. In your calculations, include both meeting costs (e.g., room rental, supplies, snacks, name tags) and travel expenses (e.g., mileage, parking, lodging). If possible, please estimate the total dollar amount associated with any in-kind contributions.

- ▪ <u>Master Trainer</u>: A health professional who is qualified to teach Workshop Leaders how to guide patients through the CDSMP Program. These people may work for your agency or they may be affiliated with another agency in your area. Master Trainers are required to conduct at least one (1) leaders training or self-management workshop per year to remain certified.

CDSMP Workshops

- ▪ <u>Number of CDSMP workshops conducted</u>: The number of Chronic Disease Self-Management Workshops your organization conducted in the past year.

- ▪ <u>Number of CDSMP workshops cancelled</u>: The number of Chronic Disease Self-Management Workshops your organization scheduled and subsequently cancelled in the past year. This data element is included only for your reference and is not factored into any of the calculations.

- ▪ <u>Total Registrants</u>: The total number of persons who registered for CDSMP workshops in the past year. This data element is included only for your reference and is not factored into any of the calculations.

- ▪ <u>Total Participants</u>: The total number of persons who participated in at least one (1) CDSMP workshop class in the past year.

- ▪ <u>Total Completers</u>: The total number of persons who completed at least four (4) CDSMP workshop classes in the past year.

Master Trainer Training

All Master Trainers must be certified by Stanford University. To become certified, a person must complete a 4 or 4.5 day Master Training conducted by two certified T-trainers. These can take place at Stanford University or can be arranged through Stanford to take place off-site anywhere in the world.

Cost Calculator Output

The calculator yields a picture of your organization's current cost structure. Based on an organization's costs and program data, the calculator assesses efficiency by estimating "per participant" costs, "per workshop" costs, and the impact of individual program components on total expenses.

CDSMP Program Cost Calculator

[Clear Input Data]   [Load example data]

Current Cost Structure

	Fixed Costs	Variable Cost per Unit	Units	Variable Costs
FIXED COSTS				
Personnel / Program Administration	$51,471.00			
CDSMP licensure	$500.00			
Other costs	$0.00			
Indirect costs	$0.00			
Marketing and Recruitment	$5,000.00			
VARIABLE COSTS				
CDSMP Workshops				
Workshop Leader Costs		$187.10	10	$1,871.00
CDSMP Workshop Costs		$336.14	14	$4,706.00
Workshop Leader Trainings				
• Master Trainer Costs		$1,528.00	2	$3,056.00
• Workshop Leader Trainee Costs		$6.91	22	$152.00
• Workshop Leader Training Costs		$1,017.00	1	$1,017.00
• Follow-up Session Costs		$100.00	1	$100.00
Master Trainer Trainings				
• Stanford		$7,049.00	1	$7,049.00
• Off-Site				
○ Training Fees		$0.00	0	$0.00
○ Master Trainer T-Trainer Costs		$0.00	0	$0.00
○ Master Trainer Trainee Costs		$0.00	0	$0.00
○ Master Trainer Training Costs		$0.00	0	$0.00
Total Fixed Costs	$56,971.00			
Total Variable Costs				$17,951.00
Total Costs				$74,922.00

Total Cost per Participant	$	375	*Total cost / number of participants*
Total Cost per Completer	$	392	*Total cost / number of completers*
Total Cost per Workshop	$	5,352	*Total cost / number of CDSMP workshops*

Percentage of Costs that are in-kind	4%

The calculator yields a picture of your organization's current cost structure. Based on an organization's costs and program data, the calculator assesses efficiency by estimating "per participant" costs, "per workshop" costs, and the impact of individual program components on total expenses.

The following costs are included in the current cost structure:

Fixed Costs

- Administration, Program Coordination, and Management: Salary and fringe benefits for paid staff, stipend/fee for volunteers, and compensation for contractors.

- CDSMP licensure: Annualized cost of CDSMP license.

- Indirect costs: Indirect costs attributable to the CDSMP program.

- Marketing and Recruitment: Cash and in-kind expenses for marketing to participants, lay leaders, and partners/funders.

Variable Costs

- Workshop Leader Trainings: Cash and in-kind expenses for room rental; charts and stands for charts; office supplies; books, tapes, videos, or CDs; food and beverage; and other costs.

- Master Trainer fee: Master Trainer costs associated with Workshop Leader Training for paid staff and contractors, including total financial compensation (salary / fee), the value of non-cash gifts, transportation, parking, lodging, and other costs.

- Leader Trainer fee: Total financial compensation, the value of non-cash gifts, transportation, and other costs for paid staff and volunteer CDSMP Workshop Leaders.

- Workshop Leader Training: Cash and in-kind expenses for room rental; charts and stands for charts; office supplies; books, tapes, videos, or CDs; food and beverage; and other costs.

- Workshop Leader Training Trainee Costs Reimbursed: Transportation, parking, lodging, and compensation for attending training.

- Workshop Leader Training Follow-up: Cash and in-kind expenses for both meeting costs (e.g., room rental, supplies, snacks, name tags) and travel expenses (e.g., mileage, parking, lodging).

- Master Trainer Trainings – Stanford: Cash and in-kind expenses for tuition paid for health professionals, tuition paid for lay persons, transportation, parking, lodging, food and beverage, and compensation for attending training.

- ▪ <u>Master Trainer Trainings – Off-Site</u>: Cash and in-kind expenses for training, and additional fees paid to trainers, such as transportation, lodging, food and beverage, and other costs.

- ▪ <u>Master Trainee Costs Reimbursed</u>: Transportation, parking, lodging, and compensation for attending training.

- ▪ <u>CDSMP Workshops</u>: Cash and in-kind expenses for room rental; charts and stands for charts; office supplies; books, tapes, videos, or CDs; and other costs.

Training Calculator

One of the key challenges in CDSMP implementation is making workshop leader trainings as efficient and cost effective as possible. Another challenge is to determine the most cost effective way to train an adequate number of master trainers. If you train too many workshop leaders or master trainers and there are not enough classes for them to teach, or if they can't maintain their certification requirements, there is little or no return on your investment. If you train too few workshop leaders or master trainers, there may not be enough to meet the demand. Another important issue is how many individuals should attend a training workshop in order to achieve a reasonable per-person cost. This calculator is designed to help organizations answer these questions, by examining the number of participants they plan to reach, and calculating the number of trainers needed and accompanying costs.

The Training Calculator will:
- ▪ Evaluate the financial impact of workshop sizes, training class sizes, and training utilization
- ▪ Calculate the number of workshop leaders your organization needs to reach a desired number of participants while minimizing training costs
- ▪ Calculate the number of participants, workshops, workshop leaders, and workshop leader trainings needed to achieve a specific cost per participant
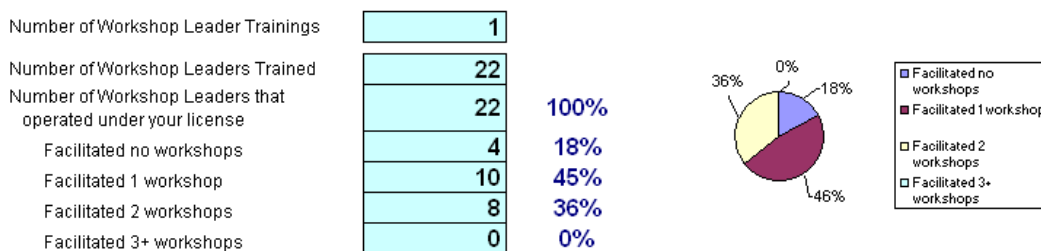
CDSMP Training Calculator

One of the key challenges in CDSMP implementation is making workshop leader trainings as efficient and cost effective as possible. Another challenge is to determine the most cost effective way to train an adequate number of master trainers. If you train too many workshop leaders or master trainers and there are not enough classes for them to teach, or if they can't maintain their certification requirements, there is little or no return on your investment. If you train too few workshop leaders or master trainers, there may not be enough to meet the demand. Another important issue is how many individuals should attend a training workshop in order to achieve a reasonable per-person cost. This calculator is designed to help organizations answer these questions, by examining the number of participants they plan to reach, and calculating the number of trainers needed and accompanying costs.

By entering information about your organization's workshop size, training class size, and training costs, the Calculator will:
- Evaluate the financial impact of workshop sizes, training class sizes, and training utilization
- Calculate the number of workshop leaders your organization needs to reach a desired number of participants while minimizing training costs
- Calculate the number of participants, workshops, workshop leaders, and workshop leader trainings needed to achieve a specific cost per
- Compare the costs of training workshop leaders with contracted master trainers or with master trainers who are paid staff
- Compare the costs of training master trainers by sending trainees to Stanford University or by bringing Stanford University trainers to your area

Current Training Utilization

Number of Workshop Leader Trainings	1	
Number of Workshop Leaders Trained	22	
Number of Workshop Leaders that operated under your license	22	100%
Facilitated no workshops	4	18%
Facilitated 1 workshop	10	45%
Facilitated 2 workshops	8	36%
Facilitated 3+ workshops	0	0%

Training Cost Manager

ASSUMPTIONS FOR PROGRAM EFFICIENCY:		*Your Program*
Workshop Leader Training Class Size	20	22
# of Workshops Faciliated by each Workshop Leader Trained	2	5.5
Follow-Up Sessions per Training	0.5	1.0
CDSMP Workshop Class Size	18	14
CDSMP Workshop Completion Rate	90%	96%

Please select which data element you would like to vary:
- ◉ Number of Workshop Leaders Trained
- ○ Number of CDSMP Workshop Participants
- ○ Cost per Participant

Training Cost Manager

After observing your current cost structure on the previous tab, the training cost manager allows you to quickly determine what effect a change in the number of Workshop Leaders trained, the number of CDSMP workshops, or the cost per participant would have. The calculator presents a scenario for maximum program efficiency, and compares it to your program's operations over the past year.

Cells highlighted in yellow can be changed by the user. Cells highlighted in blue are "read-only" and cannot be changed.

- ▪ Assumptions for Program Efficiency: The assumptions about the Workshop Leader Training class size, the number of Workshops facilitated by each Workshop Leader

trained, the number of follow-up sessions per Training, CDSMP Workshop class size, and CDSMP Workshop completion rate are based on the recommendations that Stanford gives. These assumptions may be changed to fit your program's needs.

When varying the desired cost per participant, the minimum value you can enter will depend on what assumptions you've made and what your fixed and variable costs are. If you enter a value that is too low, the Calculator will display an error message indicating that you need to enter a greater value.

Desired Cost Per Participant | 50 | *Error: Please enter a cost per participant greater than $50*

Summary Report

The **Summary** tab contains a comparative side-by-side summary of your organization's current cost structure (both fixed and variable costs) and the training calculator scenario. Excluded costs and assumptions made throughout the calculator are also included at the bottom of the report.

Depending on the information the user enters on the Cost Calculator, the following costs may be excluded from the current cost scenario:

- *Administration, Program Coordination, & Management*
- *CDSMP licensure*
- *Indirect costs*
- *Marketing and Recruitment*
- *Master Trainer fee*
- *Leader Trainer fee*
- *Workshop leader training costs*

- *Workshop leader training trainee costs*
- *Workshop leader training follow-up cost*
- *Stanford Master Training costs*
- *Off-site Master Training costs*
- *Master Trainee costs*
- *CDSMP workshop cost*

Please note that when comparing your current cost scenario to the training cost scenario, Stanford Master Training costs and off-site Master Training costs are **always** excluded from the training cost scenario.

We are currently exploring the capability of allowing the user to save and load various training scenarios or cost structures. In the meantime, the summary reports for various program scenarios can be saved individually on your computer and printed, so you can compare different strategies and targets.

Current Cost Structure

	Fixed Costs	Variable Cost per Unit	Units	Variable Costs
FIXED COSTS				
Personnel / Program Administration	$ 51,471			
CDSMP licensure	$ 500			
Indirect costs	$ -			
Marketing and Recruitment	$ 5,000			
VARIABLE COSTS				
CDSMP Workshops				
Workshop Leader Costs		$ 187	$ 10	$ 1,871
CDSMP Workshop Costs		$ 336	$ 14	$ 4,706
Workshop Leader Trainings				
• Master Trainer Costs		$ 1,528	$ 2	$ 3,056
• Workshop Leader Trainee Costs		$ 7	$ 22	$ 152
• Workshop Leader Training Costs		$ 1,017	$ 1	$ 1,017
• Follow-up Session Costs		$ 100	$ 1	$ 100
Master Trainer Trainings				
• Stanford		$ 7,049	$ 1	$ 7,049
• Off-Site				
o Training Fees		$ -	$ -	$ -
o Master Trainer T-Trainer Costs		$ -	$ -	$ -
o Master Trainer Trainee Costs		$ -	$ -	$ -
o Master Trainer Training Costs		$ -	$ -	$ -

Total Fixed Costs	$ 56,971			
Total Variable Costs				$ 17,951
Total Costs	$ 74,922			

Total Cost per Participant	$ 375
Total Cost per Completer	$ 392
Total Cost per Workshop	$ 5,352

Percentage of Costs that are In-Kind	4%

The following costs are excluded:
  Indirect Costs, Off-site Master Training costs

Training Cost Scenario

The scenario below is based on training 2 workshop leaders.

	Fixed Costs	Variable Cost per Unit	Units	Variable Costs
FIXED COSTS				
Personnel / Program Administration	$ 51,471			
CDSMP licensure	$ 500			
Indirect costs	$ -			
Marketing and Recruitment	$ 5,000			
VARIABLE COSTS				
CDSMP Workshops				
Workshop Leader Costs		$ 187	$ 2	$ 374
CDSMP Workshop Costs		$ 336	$ 2	$ 672
Workshop Leader Trainings				
• Master Trainer Costs		$ 1,528	$ 2	$ 3,056
• Workshop Leader Trainee Costs		$ 7	$ 2	$ 14
• Workshop Leader Training Costs		$ 1,017	$ 1	$ 1,017
• Follow-up Session Costs		$ 100	$ 1	$ 100
Master Trainer Trainings				
• Stanford				
• Off-Site				
o Training Fees				
o Master Trainer T-Trainer Costs				
o Master Trainer Trainee Costs				
o Master Trainer Training Costs				

Total Fixed Costs	$ 56,971			
Total Variable Costs				$ 5,233
Total Costs	$ 62,204			

Total Cost per Participant	$ 1,728
Total Cost per Completer	$ 1,920
Total Cost per Workshop	$ 31,102

The following costs are excluded:
  Indirect Costs, Stanford Master Training costs, Off-site Master Training costs

Questions/Feedback

The calculator and manual will be housed on the online Healthy Aging Community library for your use, at http://www.healthyagingcommunity.org.[3] Any future updates or edits will be made to this version. We encourage you to periodically check the library for any updates. To access these materials, simply click on the Groups tab in the top navigation bar, EBP/SS/Challenge Grantees, and the Library tab along the left navigation bar. The documents will be in the main folder.

If you need assistance or have any questions, comments, or suggestions about the calculator, please visit the EBP/SS/Challenge Grantees forum, also in the Online Healthy Aging Community. From the homepage, click on the Forums tab in the top navigation bar, EBP grantees, and the thread called "CDSMP Calculator Forum." You will be able to post questions and responses there, as well as search the thread for specific terms.

We welcome your feedback about the calculator, and feel that this online forum is the best way to promote shared learning. Thank you in advance for your participation!

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[3] Note: if you do not have access to the Healthy Aging Online Community, please visit the following survey link and fill out the required information. The CHA will contact you with further instructions.
https://www.surveymonkey.com/s.aspx?sm=vYNmb7f1jR41Y_2flm2LSqDA_3d_3d

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