Cost Estimate Guide

for Research and Evaluation Practice

A decision-support guide for project management and cost recovery

Alberta Health Services

Contributors

This document was originally developed by Evaluation Services and has been revised to meet the needs of Research Priorities and Implementation (RPI).

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Introduction

About Alberta Health Services– Research, Innovation and Analytics (RIA)

The Alberta Health Services (AHS) RIA Portfolio has a broad mandate to provide consistent and meaningful learning through effective and efficient research and rigorous evaluation. These activities are at the heart of the organization's culture and deliver the fuel that drives consistent high performance and learning.

About Research Priorities and Implementation (RPI)

As part of RIA, Research Priorities and Implementation (RPI) consists of the following expert teams designed to enable and enhance quality patient-oriented research and evaluation.

Engagement, Education and Capacity is a provincial service that develops and delivers research learning opportunities in partnership with academic and provincial research and innovation institutions. Through the Assistant Scientific Directors (ASDs) in the research arm of the Strategic Clinical Networks (SCNs), this operation collaborates with the scientific community to identify and support scientific rigour, best practice, and advancement of research priorities within AHS.

Evaluation Services is a provincial service that supports a rigorous evaluation approach and skill set to support evidence-informed decision making for clients throughout AHS that will help inform and improve practice and patient care.

Knowledge for Change is an evidence-based knowledge translation science. Practice supports include training, academic-quality grant and project support, KT plans, knowledge brokering, synthesis, decision support, and dissemination expertise, including advice on implementation.

Research Facilitation is a provincial service that provides rigorous hands-on expert consultation and support for approved projects pre-submission and post award that have been endorsed by the dyadic leaders for the SCNs and the operational leaders for clinical departments.

Workforce Research and Evaluation is a provincial service that conducts joint research and evaluation projects to inform the effective use of the clinical workforce and the design of integrated collaborative service delivery models.

Purpose of this Guide

Cost Estimate Guide for Research and Evaluation Practice is a companion resource to *Business Standards for Research and Evaluation Practice*. The purpose of this guide is to enhance the efficiency and effectiveness of project management by estimating the required time and resources for research and evaluation-related work. This is not an easy task. While some routine activities are fairly predictable, others are not. You need to consider many variables, including

This guide is a companion resource to Business Standards for Research and Evaluation Practice.

project scope and level of complexity. This guide includes rationale and recommendations based on professional and practical experience as well as established acceptable practice within Alberta Health Services (AHS).

As our services evolve to meet the needs of the organization, this document will be periodically revised.

We welcome and encourage feedback from anyone who uses it.

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Time & Fixed-Cost Estimates for Research & Evaluation Activities

Activity	Description	Resources	Time Estimate	Fixed-Cost Estimate	Additional Notes
PLANNING, DEVELOPMENT & SUPPORT					
Consultation	Respond to client requests for service; determine need for evaluation resources; help clients access resources or network best options if we do not provide service; address just-in-time need for information.	Project Management	1–3 hours		Initial consultations are usually provided as an in-kind contribution. However, depending on need, consultations can require considerably more time. Consider charging when time exceeds 3 hours.
Mentoring & Advising	Mentoring for projects with no budgets but, with this minimal support, could carry out their own project; Project Ethic support; committee and/or advisory work (aside from routine evaluation project involvement).	Project Management Operations	2–10 hours		
Research	Review background and historical documentation; research on similar project work; determine appropriate methodology.	Project Management (PM) Operations (OP)	Approx. 1–3 days PM (1) OP (2)		
Logic Model	COSTING ITEMS TO CONSIDER: Background review (3 hours); 2 face-to-face meetings (minimum) & 1 phone meeting (minimum) @ 2 hours each (6 hours); drafting & revisions (6 hours); + return travel and expenses.	Project Management Operations	Approx. 4 days PM (2) OP (2)		
Budget	Budget itemizes cost estimate and breakdown for all evaluation tasks and forecasted expenses. COSTING ITEMS TO CONSIDER: Time to draft initial budget; optional case scenarios for consideration; revisions; budget reviews; quarterly invoicing reports; final budget breakdown.	Project Management	2 days (minimum)		

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Activity	Description	Resources	Time Estimate	Fixed-Cost Estimate	Additional Notes
Evaluation Framework	Time required for framework development is completely dependent on the nature and scope of project and stage of evaluability. Collaboratively designed frameworks can take several months and multiple meetings and revisions to complete.	Project Management	2 days (minimum)		
KT Design	Theory based intervention and/or implementation design. COSTING ITEMS TO CONSIDER: Review intent and literature; devise a strategy based on mid-range theories and/or grand theories, as required.	Project Management	2 days (minimum)		

DATA COLLECTION

Activity	Description	Resources	Time Estimate	Fixed-Cost Estimate	Additional Notes
Data Collection Preparation	**Data collection tool development and testing**	Project Management Operations			
	Resource development Train operational staff.	Project Management			
	Operational staff training Include orientation time for newly recruited staff.	Project Management Operations	3–6 hours		
	Systematic Review (SR) extraction tools and database set-up for SR (in Excel)	Project Management Operations	Up to 3 hours		
TeleForm Scanner	**TeleForm Designer** Design of data capture tool and system set-up in TeleForm software. COSTING ITEMS TO CONSIDER: Back-end design; database set-up; field order and values; design changes; editing; proofreading; testing; activating. Development can increase in complexity depending on type of characters and question styles used (single, multiple choice, open-ended).	Operations	Up to 4 hours per page		
	Data dictionary Includes time, coded values, and file pathway to the database. Flagged issues that occur during data collection and corresponding rules are added as they are generated.	Project Management Operations	30 minutes for medium-sized survey		Dictionary is completed once the form is activated.
	Scanning TeleForm paper survey tool is scanned and digitalized into a database.	Operations	30 seconds per page		Transcription for open responses is not included in the time estimate. Qualitative responses require manual support.

Activity	Description	Resources	Time Estimate	Fixed-Cost Estimate	Additional Notes
	Verifying the form For content within comments, TeleForm immediately highlights any questionable or illegible data after each page is scanned. The operator has the opportunity to verify and make corrections. The quality (legibility) of survey responses affects the time required for this step.	Operations	1 minute per page (without open-ended comments or multiple choice questions)		Flagging issues occurs at this stage. Rules are generated to address those issues. The need for flagging is usually greater at the beginning of a survey. The need will reduce over time.
	Quality Assurance (QA) Someone other than the initial scanner completes a QA process by performing a random, systematic check on a batch of scanned surveys to ensure that the program has read and entered the survey data correctly. STEPS: Retrieve whole batch entered; review the database; choose one survey per batch; QA for issues; if there are issues, pull and QA another survey.	Project Management Operations	30 seconds per page (Quantitative data only) Note: Quality of the scanner dictates time required.		**Batch** = Number of documents scanned at one time. Size of batch depends on number of pages in survey. **Some practice** guidelines suggest pulling 10% of each batch. **Recommended practice** is currently to QA one survey per batch. Repeat if issues arise. All qualitative data is reviewed once transcribed.
Paper-based Surveys	**Draft survey tool**	Project Management Operations			
	In-house printing Include staff time required for printing.	Operations	Based on volume	In-house printing jobs are restricted to < 2000 letter pages (one side). Edmonton Biz Hub printer (2012/2013): • $0.11 per page for colour • $0.01 per page for black and white • Black cartridge $60 • Colour cartridge $180 • Waste toner box $60	
	Outsourced printing Consider items such as colour, double-sided, unique ID printing, stapling, folding, stuffing envelopes. Volume alters unit costs significantly.	Project Management (request/review bids)	3 hours	**Example (2013)** $2.33 per survey (6 pages) (included printing, return envelopes with postage). Volume: 80,000 surveys **Example (2014)** 2-page survey (double-sided), black/white, unique TeleForm survey ID number printed Volume: 4,200 surveys Unit cost: $0.1121 each	
	Envelopes	Operations		Case Legal (250) $53.21 (2014) Case Letter (500) 24.13 (2014)	

Activity	Description	Resources	Time Estimate	Fixed-Cost Estimate	Additional Notes
	Survey distribution for 100 Prepare mailing list; format/print mailing labels as per Canada Post machineable mail requirements; quality assurance.	Operations	0.5 day	**Canada Postal Rates as of March 2015:** **Domestic letter** ≤ 30 grams: $0.77 (meter) $0.85 (stamp) **Domestic oversize** ≤ 100 grams: $1.65 (meter) $1.80 (stamp)	
	Mailing Set up, fold, label and stuff envelopes; acquire postage; mailing; clean up.	Operations	3–5 hours		
	Postage	Operations			
	Return postage license Business reply.	Operations		Annual license: $690.00 (2015)	**Return Postage (2015):** Letter ≤ 50 grams: $0.84 (machineable) Letters ≤ $2.10 return (non-machineable)
Telephone-based Surveys	**Finalize survey and program into software** (VOXCO) Test in CATI; test survey script. Consider length of survey and the amount of skip logic that needs to be programmed into the tool.	Project Management Operations	2–5 days Approx. 15 minutes per question		VOXCO can be used for both high- and low-volume work. Therefore, any project regardless of size can be accessed regardless of whether or not the telephone lab staff are involved.
	Interviewer training and orientation Include resource development; scheduling; training time; initial follow-up and support; 4 hours training per interviewer.	Project Management Operations			
	Sample management Include time to load and manage sample over the course of the project.	Project Management	2 days minimum; more for longer term projects	None	
	Sample purchase Used for population-based surveys using random digital dialing.	Project Management		$0.07 per number	
	Long distance phone charges			No charge for internal projects	AHS policy: long distance phone charges are absorbed by the organization. No charge should be levied for even external projects.
	Interviewing	Project Management Operations (Interviewers)	Flow Rate + 30% (time it takes to recruit and complete the interview)	Field test actual instrument to establish estimate of time. Balance estimate with past project actuals. Target population and geographic unit will cause variance to flow rate. EXAMPLE If a survey is 15 minutes long, the flow rate estimate will increase the required time to 24 minutes. EXAMPLE If a survey requires random digit dialing and recruit in sub geographic areas, a 20-minute survey may have a flow rate of 71 minutes.	

Activity	Description	Resources	Time Estimate	Fixed-Cost Estimate	Additional Notes
	HRI supervision	Project Management Operations (Monitor)	Add 18% of interviewing hours		If needed, increase the number of hours that the part-time supervisors work.
	Quality Assurance	Operations (Monitor)	Add 18% of interviewing hours		This work is sometimes done by the supervisor.
Web-based Surveys	**AHS client-administered** AHS client access to web-based survey tool.	Operations		No charge	AHS client requests survey tool & self-administers. Our obligation ends with providing login and technical support, as required.
	RPI staff-administered For web-based survey for client. COSTING ITEMS TO CONSIDER: Completeness of survey questions; formatting; skip logic; deployment set-up; dissemination plan (acquiring/loading mailing list or distributing to key contact for broadcasting); promotion and communications plan; monitoring; prompts via reminders; cleaning. (Does not include data visualization and reporting requirements.)	Operations	2–4 days		
Focus Groups	**Preparation** Question design; consent; cover letter.	Project Management Operations	1 day		Must calculate the cost of focus group preparation separately when multiple focus groups are involved.
	Set-up, consent, execution, debrief COSTING ITEMS TO CONSIDER FOR OPTIMUM SIZE GROUP (6–10): Set-up (30 minutes); introduction and consent (30 minutes); focus group (60 minutes); debrief and pack (30 minutes). (Does not include travel, recruitment, transcription, analysis.)	Project Management Operations	2.5 hours for 1-hour session		Focus groups are commonly conducted as a team of 2 people. One person supports set-up, scribes, and/or co-facilitates. Sessions are routinely recorded (unless participants disagree). See page 10 for transcription cost estimates.
	Recruitment and scheduling Note: Recruitment and booking a focus group venue should remain the responsibility of the client whenever possible. Standard is to invite 15 people to ensure optimum group of 6–10 participants.	Project Management Operations	1–3 days		A signed consent is used with participants who are recruited by a third party to ensure they have been informed. Anonymity is controlled through reporting and keeping participants lists private from recruiters and/or clients.
Face-to-face Interviews	**Preparation** COSTING ITEMS TO CONSIDER: Question design (varies depending on question type, target population, customizing pre-existing questions); cover letter; consent forms; pilot testing.	Project Management Operations	1 day (minimum)		Does not include execution, recruitment, travel, transcription, or analysis. Must calculate interview preparation separately when multiple interview sessions are involved. Cost out only once.

Activity	Description	Resources	Time Estimate	Fixed-Cost Estimate	Additional Notes
	Recruitment COSTING ITEMS TO CONSIDER: Clients should provide a list of target individuals or those willing to be contacted. We complete recruitment and booking.	Project Management Operations	30 minutes per participant		
	Training resource development For Health Research Interviewers (HRI)	Operations	2 days (minimum)		Required for multiple interviewers and with multiple sites. Customizing previous training resources may help to reduce costs.
	HRI training	Operations	1–3 days		
	Set-up, consent, execution, debrief	Operations	1.5 hours for 1-hour interview		Does not include recruitment, travel, transcription, analysis. Always record sessions. See page 10 for transcription cost estimates.
	Data cleaning, coding, analysis	Operations	1 hour of interviewing (one person) requires up to 3 hours for analysis		
Document Review	**Design, pilot, training** COSTING ITEMS TO CONSIDER: Development of a systematic approach to ensure consistency, efficiency, effectiveness; tool development; testing.	Project Management Operations	2 days		May include minutes, RFPs, foundation documents to the project/program, grants proposals, funding commitments, reports, system data, etc.
	Execution COSTING ITEMS TO CONSIDER: Pilot testing the tool helps estimate unit time costs; cost of accessing records; travel costs (see pages 14-15); data management (see pages 9-10).	Operations			
Participant Observation	**Design** COSTING ITEMS TO CONSIDER: Pilot testing method.	Project Management Operations	3 days		
	Training resource development	Project Management Operations			
	Observer training	Operations	1–3 days		
	Execution COSTING ITEMS TO CONSIDER: Travel costs (see pages 14-15); data management (see pages 9-10).	Operations			

Activity	Description	Resources	Time Estimate	Fixed-Cost Estimate	Additional Notes
Chart Audit	**Data collection tool design** COSTING ITEMS TO CONSIDER: Chart type (paper on-site, electronic record); data dictionary.	Project Management Operations			**Consider the type of audit:** **Retro** (on discharged or deceased patients) so charts could ideally be pre-ordered and pulled ahead of time from health records. May require less staff time. Iron Mountain (archived records) requests should be factored into planning, if required. **Live** (on patients or residents in active care) so charts are pulled from nursing stations, as required. Most likely will require more staff time. More time is required for data cleaning if data capture is completed by front-line staff.
	Pilot testing data collection tool COSTING ITEMS TO CONSIDER: Time for rater reliability; piloting in more than one site (for large, multiple-site project); revisions to the tool and methodology.	Project Management Operations			
	Training resource development COSTING ITEMS TO CONSIDER: Staff time; distribution (printing costs).	Project Management Operations			
	Auditor training COSTING ITEMS TO CONSIDER: Training method—in person (meeting coordination, staff time, travel, accommodation); virtual (staff time). ES auditors require less training and follow-up than front-line clinical staff on sites.	Project Management Operations	1–3 days		
	Execution COSTING ITEMS TO CONSIDER: Cost of accessing records (from Iron Mountain or for on-site pull); time for audit team to orientate to the site and set up work space(s); travel costs (see pages 14-15); data management (see pages 9-10).	Operations			
Data Extraction from Existing Electronic Data Sources	Extraction of electronic data for secondary use to inform evaluation or for project monitoring. Data may be obtained from a number of sources including AHSDRR, Netcare, or other electronic medical records. Time required depends on nature and complexity of the inquiry, level of automation, and access to required data.	Operations			

DATA MANAGEMENT

Activity	Description	Resources	Time Estimate	Fixed-Cost Estimate	Additional Notes
Database Set-up	**Design** COSTING ITEMS TO CONSIDER: Data capture tool—refinement of draft; formulas; drop-down menus; testing. Type of software, formatting, and linking relational data affect required resources.	Operations		See notes »	**For 80 data element database:** • Access 5 days • Excel 2–3 hours • SPSS 2–3 hours NOTE: Excel does have the capacity to build an Access-like data capture tool but is not as rigorous. Simpler Excel database spreadsheets are more common.

Activity	Description	Resources	Time Estimate	Fixed-Cost Estimate	Additional Notes
Database Merging	While integrating databases is primarily an automated function, the quality assurance before and after the merge can require considerable time. ISSUES WITH MERGING RAW DATA: Frequency of variables without consistent formatting and coding; volume.	Operations			
Manual Data Entry	Data entry other than scanned documents. Requests to digitalize and clean data collected by a third party.	Operations	$34-$50 per hour		Depends on staff availability at the time of contracting.
Transcriptions	**Transcriptions from digital recordings** COSTING ITEMS TO CONSIDER: Verbatim transcription; point form transcription; special formatting and layout; quality of recording.	Operations or outsourced	3–5 hours per recorded hour for individual interviews 4–6 hours per recorded hour for group interviews		
Data Cleaning	Database cleaning is a routine function prior to analysis. COMMON ISSUES TO CONSIDER: Duplicate records; missing values; erroneous data. Anticipate that databases compiled by front-line staff and other third parties other than DIMR Analytics or other skilled data analysts require more resources.	Project Management Operations			
Data Analysis	COSTING ITEMS TO CONSIDER: Level of complexity of analysis; type of data visualization approaches; level of breakdown and detail articulated.	Project Management Operations			
KT Analysis	Used for systematic reviews, KT projects, summarizing evaluations, surveys, etc. COSTING ITEMS TO CONSIDER: Level of complexity of analysis; level of breakdown and detail articulated.	Project Management Operations			
Data Dictionary	Data dictionaries should be created for any new data collection system used by clients, interviewers, teams of auditors, and so on.	Operations	4–6 hours		
Disposition Codebook	Definitions of alphabetical or numerical codes used in large-scale survey database reporting on outcomes such as completed, uncompleted, exclusions.	Operations	1–2 hours		There is no universally established use of codes. Codes are customized with respect to the needs of the project, third party analyst, and client expectations.
Coding Manual/ Legend	List of predetermined codes to guide data analysis. Coding manuals are developed for both quantitative and qualitative work.	Operations	1–2 hours		Coding manual would be developed for internal use (not for external dissemination). The use of a coding manual depends on the approach taken so beginning by predetermining codes for analysis is not always possible (i.e., Grounded Theory).

Activity	Description	Resources	Time Estimate	Fixed-Cost Estimate	Additional Notes
RESEARCH SUPPORT					
Major Research Project Preparation	**Data assembly** COSTING ITEMS TO CONSIDER: Linkage; cleaning; labelling; validating.	Senior Data Analyst	80 hours		Cost estimating is highly variable: depends on data sources, clarity of research questions, and level of preparation by researcher.
	Completion of Schedule C	Senior Data Analyst	10 hours		
	Meetings/communication with researcher to clarify data needs	Senior Data Analyst	4 hours		
	Preparation of data to provide to research	Senior Data Analyst	4 hours		
Pre-Fetch	**Meetings/communication with researcher**	Senior Data Analyst KT Scientist	4 hours		
	Consultation with methodologist	Senior Data Analyst KT Scientist	2 hours	May not be required	
	Consultation with biostatistician	Senior Data Analyst KT Scientist	1 hour	May not be required	
	Description of data requirements	Senior Data Analyst	4 hours		
	Access data and link where necessary	Senior Data Analyst	8 hours	Variable – may not be required	
	Construct tables of cohort sizes	Senior Data Analyst	4 hours	Variable – may not be required	
	Report results to researchers/groups	Senior Data Analyst KT Scientist	2 hours		
Brief Consultation	**Communication and preparation**	Senior Data Analyst	1 hour		These consultations may be with methodologists and biostatisticians in research facilitation (would likely require less time if this is the case).
	Consultation	Senior Data Analyst	1 hour		
	Follow-up/tracking	Senior Data Analyst	1 hour		
Major Research Project Analysis	**Data preparation** COSTING ITEMS TO CONSIDER: Linkage; cleaning; labelling; validating.	Biostatistician	80 hours		Highly variable: depends on data sources, clarity of research questions, and level of preparation by researcher.
	Development of analysis plan/feedback	Biostatistician	10 hours		

Activity	Description	Resources	Time Estimate	Fixed-Cost Estimate	Additional Notes
	Data analysis COSTING ITEMS TO CONSIDER: Descriptive tables; modelling; table preparation; figure preparation; text.	Biostatistician	80 hours		
	Revision of analysis	Biostatistician	20 hours		
	Final preparation of manuscript/report	Biostatistician	10 hours		
	Meetings/communication	Biostatistician	10 hours		
Grant Preparation	**Meetings/communication**	Biostatistician	5 hours		
	Research	Biostatistician KT Scientist	5 hours		KT can help with needs assessment, grant types (KT or implementation), review of applications, KT requirements.
	Sample size calculation	Biostatistician	8 hours		Despite perceptions by some researchers, quick calculations are extremely rare (may take days).
	Methods and analysis section	Biostatistician	4 hours		
	Supporting materials/references	Biostatistician	4 hours		
	Review/revise grant sections	Biostatistician	4 hours		
Brief Consultation	**Communication and preparation**	Biostatistician	1 hour		Rare and not desirable. Researchers often underestimate time required.
	Consultation	Biostatistician	1 hour		
	Follow-up/tracking	Biostatistician	1 hour		
Executive Queries	**Communication and preparation**	Biostatistician	1 hour		Can vary in length: usually requires 0.5 to 1 day, depending on amount of material to be reviewed. NOTE: Decision-support processes may be considered the same as Executive Queries, requiring literature searches, summaries, slide deck preparation.
	Meetings with concerned parties	Biostatistician	1 hour		
	Review of materials	Biostatistician	2 hours		
	Recommendations	Biostatistician	2 hours		

OTHER RELATED ACTIVITIES

Literature Search	Quick scan of literature; compiling abstracts and titles only.	KT Scientist Operations	1–2 days		
Literature Review	Deeper, more comprehensive review of existing literature; information compiled and reported back in a matrix that outlines demographic information, purpose, outcomes/findings/conclusions.	KT Scientist Operations	1–2 weeks		

Activity	Description	Resources	Time Estimate	Fixed-Cost Estimate	Additional Notes
Posters	**Design, development, printing** COSTING ITEMS TO CONSIDER: Consultation/planning (3 hours); design, layout, approval, final draft (10 hours); in-house or outsourced printing (2 hours); shipping (2 hours).	KT Scientist Operations	2 days	~$70 36" x 48", 4-colour, matte paper, basic lamination (2015)	Posters must be outsourced. Campus services such as Information Service & Technology and Sub Printing Services at the U of A offer reasonable rates.
Writing for Publication	A discretionary service. Decision to commit to writing for publication must be value added to RPI. Fee for service may be negotiated if staff are involved, but does not gain primary authorship.	Project Management KT Scientist Operations	No charge if RPI staff are primary authors		
PowerPoint Slide Decks	**Layout with presenter's notes** An optional service that may be offered as a method of supporting results dissemination and commitment to improving utilization of evaluation results. Do not provide this service if we were not involved in the analysis or visualization the data.	Project Management KT Scientist Operations	2–3 hours	No charge	
Communications Plan	Communications supporting the integration of the evaluation within the local environment; increased buy-in from staff; supporting communications (promotions, posters, communiqués, newsletter).	Project Management KT Scientist Operations	Depends on request	No charge: part of managing evaluation	If client desires a high-level communications plan, suggest that they explore possible services from AHS Communications Dept.
Incentives	Prizes from a lottery or contest. Financial support to reduce the burden of participating (such as child care, parking, transportation). Surveys generally have a better response rate if incentives are offered.			Client is responsible for the cost of incentives	The use of incentives must be sensitive to the social and political environment. Therefore, clients must be involved in decision making around incentives. Generally an AHS restricted activity, Evaluation Services has special privileges from CEO Duncan Campbell to use incentives as a form of best practice (November 2013).
Administrative Fee	Based on percentage of the costs of human resources connected to the project.		External projects: 10% Internal long-term staff based on actual FTE: 2% (to maximum of $3,000)		

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Activity	Description	Resources	Time Estimate	Fixed-Cost Estimate	Additional Notes

TRAVEL

Activity	Description	Resources	Time Estimate	Fixed-Cost Estimate	Additional Notes
Mileage	**Use of personal vehicle for work** All travel requires valid business reasons. You are advised to have business insurance, which may be eligible for reimbursement. Major travel expenses that will be charged back to project should be pre-approved by the project financial manager. This step is not necessary if travel allowances have been itemized in the approved Work Agreement Budget.			0.505 per km for the first 5,000 km per calendar year $0.470 per km for all additional km over 5,000	Also refer to AHS Hospitality, Travel and Education Policy. Use of personal vehicle for business must not exceed the cost of renting a car (maximum 200 km round trip). AHS does not reimburse for commuting between home and designated first and last destination within your home site.
Parking				Actual parking costs	Charges can vary depending on destination. Typical rate in urban centres is $5 per hour.
Third Party Rentals	Use a rental vehicle when the cost of claiming mileage exceeds the cost of a rental. Most rental agencies have a corporate rate with AHS. Include staff time to and from the rental depot.			$50–$60 for 24-hour rental (mid-size car, unlimited mileage (2015) COLLISION WAIVER: $30 per day	When renting a vehicle, use a credit card that provides insurance (such as VISA or AHS P-Cards). If you do not have a credit card that carries this coverage, you must purchase the collision waiver in the rental contract.
Taxis and Public Transit	Taxi fares within city limits; LRT; bus.			Taxi fares are not to exceed $100 without permission. Gratuity up to 15% can be claimed (2015)	
Air Travel	Economy for flights < 4 hours Business for flights > 4 hours			Up to max $600.00 (within Alberta) $1,000 (within Canada) $2,000 (within U.S.A.) $3,000 (outside North America)	See AHS travel polices for additional information. Flights should be booked up to two weeks in advance to ensure the best rate. You can claim excess baggage charges.
Accommodation				Up to max $200.00 ($250.00 in North Zone)	

Activity	Description	Resources	Time Estimate	Fixed-Cost Estimate	Additional Notes
Meals	Breakfast $9.20 Lunch $11.60 Dinner $20.75			Max $41.55 per day for three meals	
Travel Time			Actual time including time exceeding regular working hours		
Overnight, Evening, and Weekend Shift Work	When project work requires overnight travel, employees can bank 4 hours at regular salary to be taken back within that fiscal quarter. Hours are coded as a regular daytime shift. When project work requires employees to work a shift where the MAJORITY OF SUCH SHIFT falls between the hours of 1500 to 2300 hours or 2300 Friday to 700 Monday, employees are entitled to shift premium. Time sheets cannot exceed 38.75 hours per week. To ensure shift deferential payment, alter time sheet to show evening or weekend hours.		**Overnight travel:** 4 hours per overnight stay **Evening or weekend premium:** $2.25 per hour		One personal long distance call for each consecutive 24-hour period of absence can be claimed, as can business-related phone calls. Laundry and dry cleaning can be claimed if travelling for 4 or more consecutive days.

Guided
conversations
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about reporting
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Reporting

Guided conversations with the client about reporting requirements are essential to completing the cost estimate. These discussions help to determine the type of report (summary, technical, summative); frequency of reporting (interim, final); target audiences for dissemination that may require modified versions of the main report; and scope of the project (number of facilities and communities involved). Report writing varies depending on the nature of the project. Consider the following as a guide.

Every report must contain the necessary archival information to ensure that it can be fully understood long after the end of the project.

Time estimates should be based on operational staff time completing the majority of writing. In the best case scenario, operational staff have the skills and ability to do the bulk of report writing under the guidance of the Evaluation Lead, whose main contribution would be to supervise and ensure quality. However, that may not always be the case.

Activity	Description	Resources	Time Estimate	Additional Notes
Executive Summary	1–3 pages summarizing the contents of the report.	Project Management Operations	1 day	
Table of Contents	Auto-formatted as much as possible.	Operations	1–2 hours	
Acknowledge-ments Reference List	Including acknowledgements demonstrates collaboration, honours participation, and helps to validate the worthiness of the evaluation. Reference list should capture all documentation and evidence (grey literature and research) used to support the evaluation or project-related documents referred to in the report.	Project Management Operations	0.5 day	
Background	This section may include: • Prevailing health issue or problem at the national, provincial and/or local level • History of the project/program • Justification for funding the project/program	Project Management Operations	0.5 day (minimum)	
Project/ Program Description	This section may include: • Vision statement, assumptions • Goals and objectives, expected outcomes • Strategies • Communities, sites involved • Logic model	Project Management Operations	0.5 day	
Purpose/ Principles Statement	This section may include: • Purpose of the work • Principles of the work • High-level overview of areas of focus	Project Management Operations	1–2 hours	

Activity	Description	Resources	Time Estimate	Additional Notes
Methods	This section may include: • Methods • Instrument sources—information about reliability and validity • Instrument design—approach, testing involved • Sampling framework • Analysis plan (how indicators relate to objectives) • Evaluation timelines matrix • Ethics—all activities related to ethical oversight and mitigation of identified risks	Project Management Operations		
Analysis and Presentation of Findings	**Descriptive** Present descriptive statistics or themes; present information in table or graphics form; identify highlights in data.			
	Monitoring Same data is reported on a regular frequency; this type of reporting should be transitioned to electronic reporting; limit narrative. **Technical** Analytic reports with minimal narrative.			Repetitive monitor reporting should take minimal time to produce once the reporting template is established.
	Comparative As "descriptive" but includes data matching and/or statistical comparisons; some narrative.			
	Interpretive As "comparative" but includes interpretation of results; may include results from mix methods and the synthesis of this information in context with research and or other program information, triangulation of data, advanced statistical analysis.		Comprehensive, "interpretive" report that includes all sections of reporting could take up to 12 weeks	
Recommenda-tions	Draft recommendations are based on the findings (usually at the "interpretive level" of presentation) and refined in consultation with the client to ensure that they are actionable, realistic items.	Project Management	1–3 days	
Appendices	This section may include: • Copy of all instruments used in data collection • Summary of qualitative data themes (anonymous) • Evaluation framework • Interview and focus group guides and questions • Other information pertinent to the evaluation, but not included in the main body of the report			
Quality	All draft reports **must be receive a quality check** prior to being sent out to clients for review including: • Readability (clear, concise language) • Copy editing (grammar, spelling) • Proofreading (formatting, layout, accuracy)		Up to 2 days for large report for check and revision	

Activity	Description	Resources	Time Estimate	Additional Notes
Validation	Key clients review all reports. Limit feedback to two reviewers.		1–2 weeks	Timelines for reviews should be discussed with the client. Generally, a deadline of 2 weeks for review and 1–2 weeks to complete the final version of the report (providing extensive changes are not required).
Generating Automated Reports from Select Survey	Generating automated reports requires little to not time. However, the report should be reviewed to ensure anonymity and confidentiality.		Up to 3 hours (maximum)	

References

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