

Social Return on Investment Planning Worksheet

Program:

Program Component:

- **Time period:** What time period will your cost-benefit analysis cover?
- **Cost data:** Can you provide accurate cost data for all relevant program components for your time period?
- **Participant data:** Can you identify the number of participants served by the program component over the time period?
- **Outcome data:**
 - Do you have basic outcome data for this program component for the time period?
 - If you do not have outcome data, are there national studies of similar programs that you can use to generate estimated outcomes?
- **Comparison data:**
 - Can you use actual data on program participants before and after the intervention to provide viable comparison data to show the impact of the program component?
 - If not, are there national studies that can be used to create a proxy control group for the different populations and outcomes you want to focus on?
- **Potential benefits:** Can you identify one or more of the following potential benefits of the program component?
 - Direct benefits to the individual participants
 - Benefits to other individuals
 - Cost savings to society
 - Financial returns to society
- **Monetary value:** Are there national data that you can use to estimate a monetary value for one or more of the above benefits?
- **Actual cost savings data:**
 - Can you gather data on your individual program participants from other public agencies or will privacy issues or logistical barriers preclude it?
 - Can you cross-reference your program participation data with the data from other public agencies to compare participants' service usage before and after the program?
 - Is the data on service usage from other public agencies available for the timeframe that you want to study?
 - Can the public agencies provide data on the actual costs of the services used?