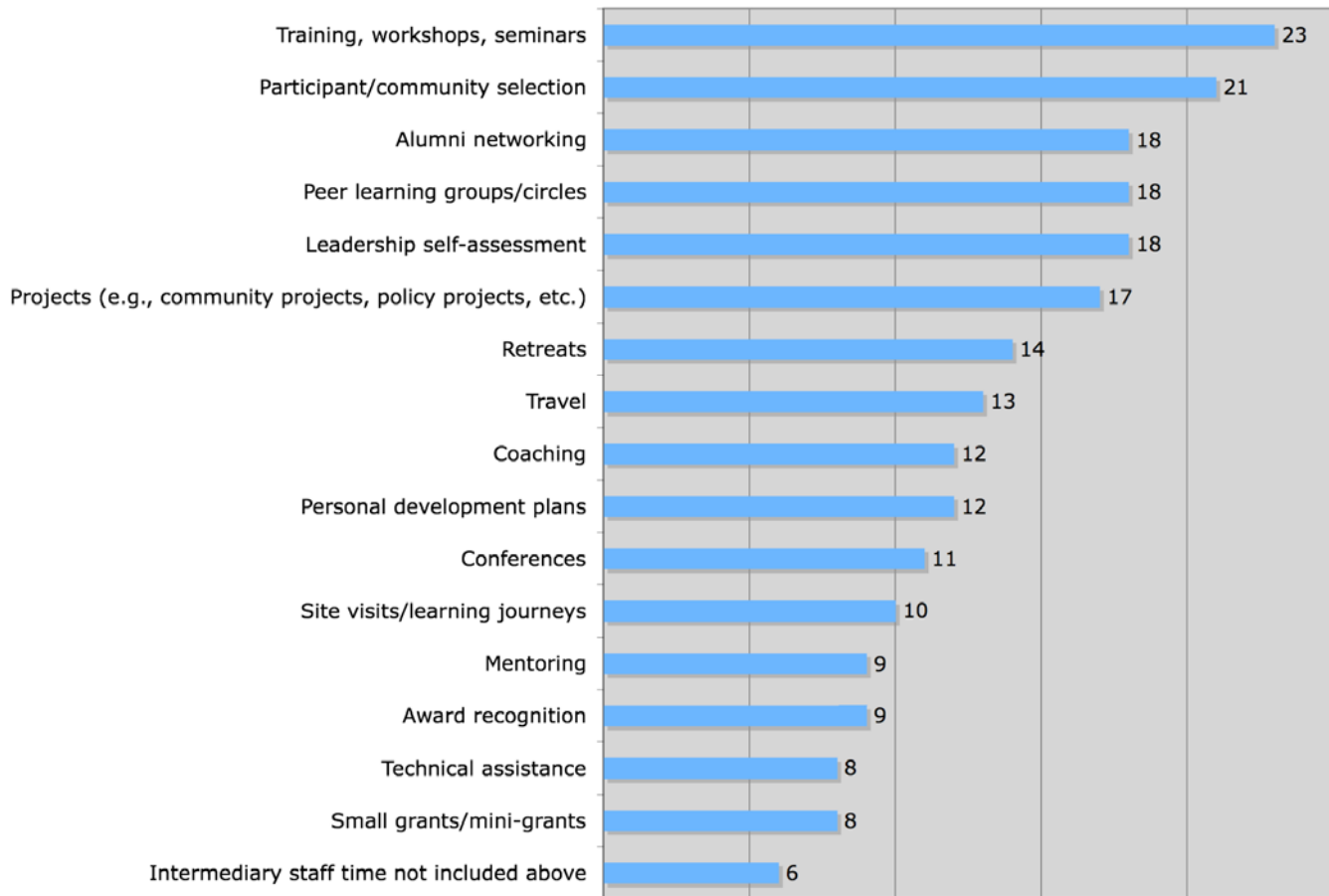


**Summary
Cost Benefit Survey Results
October 24, 2007**

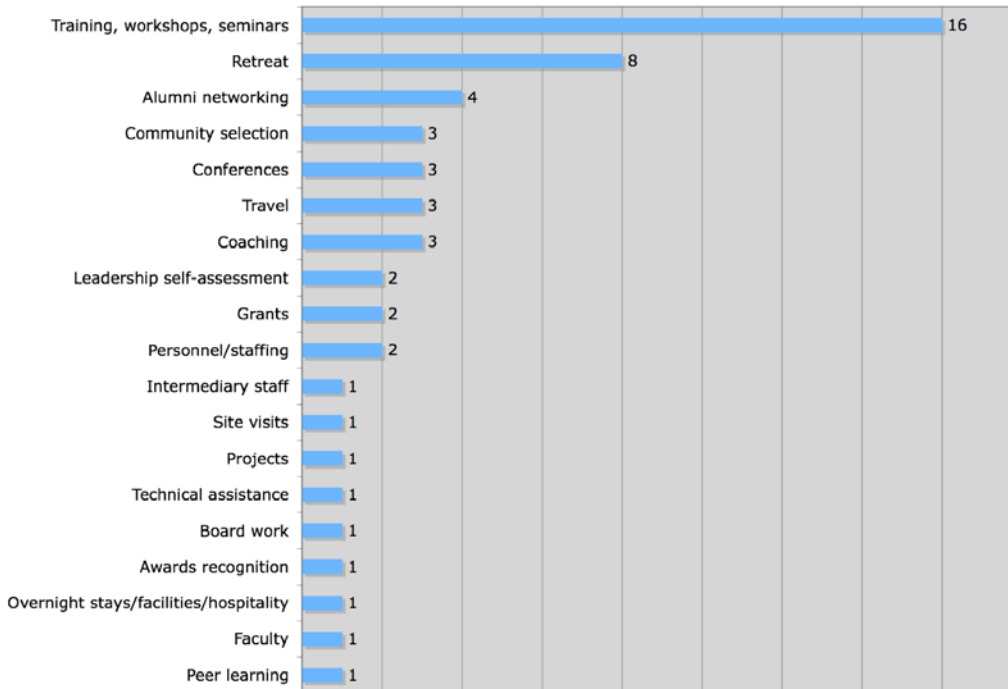
1. Survey Respondents:

- Fund the program (33%- 8)
- Operate the program (75% - 18)
- Evaluate the program (46% - 11)
- Other (8% -2)

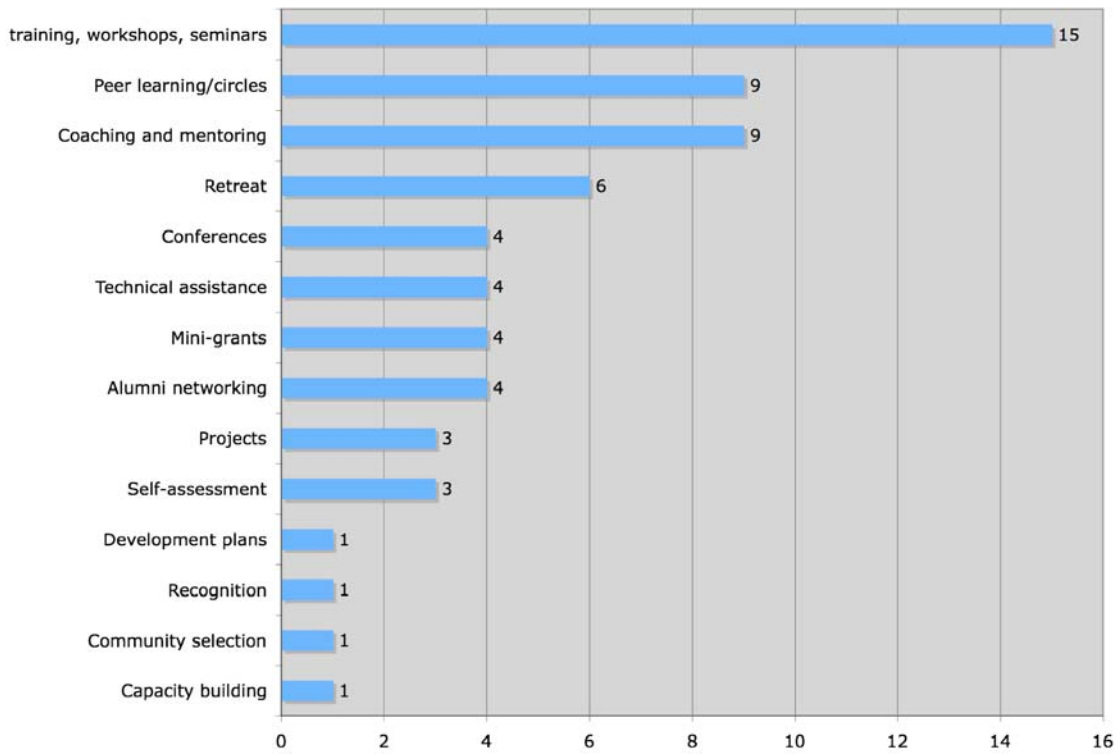
2. For the program you are thinking about, mark the program components that are part of the program that you operate, fund or evaluate.



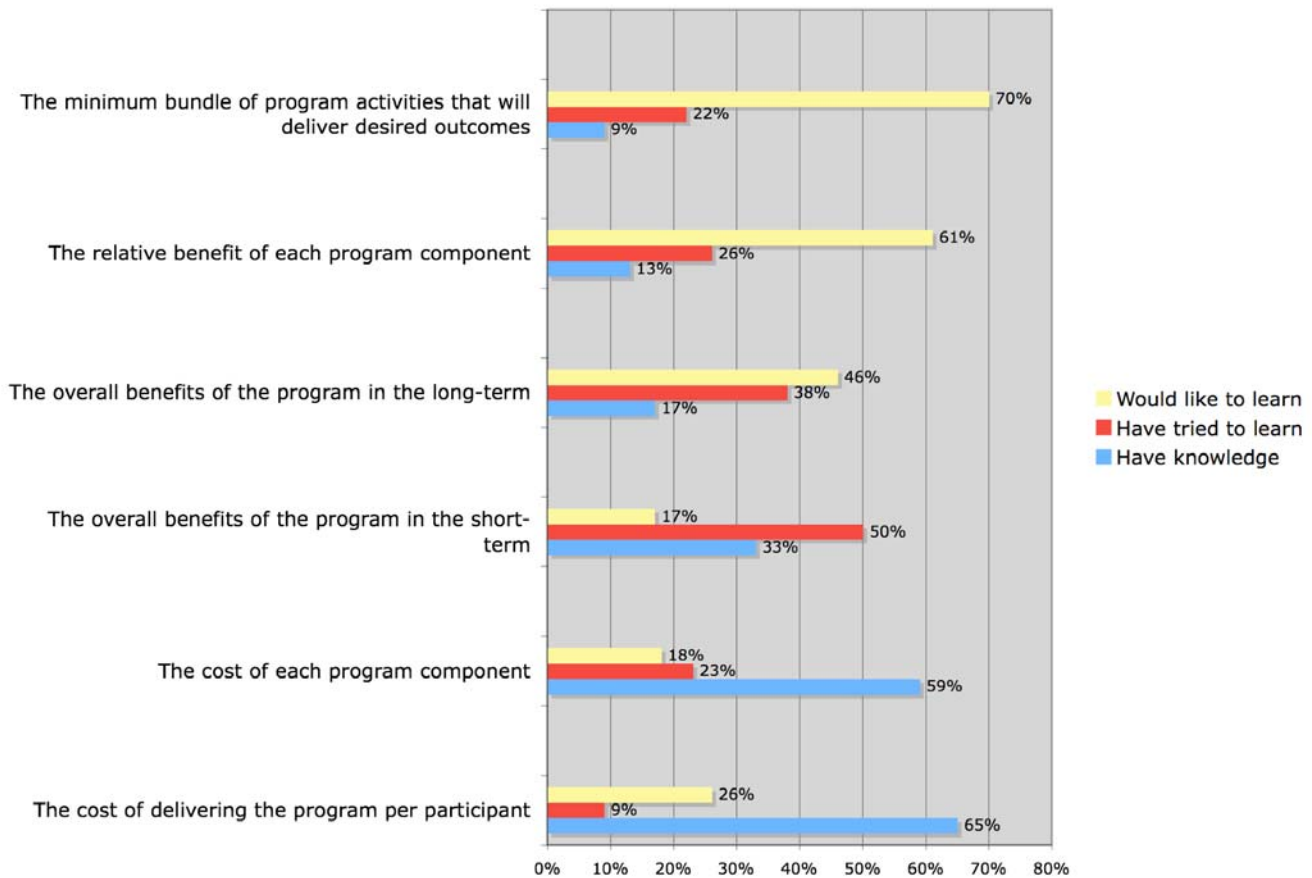
3. What program components are most costly?



4. Which elements do you feel contribute most significantly to your program outcomes?



5. Summary of Learning About Program Costs and Benefits



6. When the program was designed, what considerations were there about costs and benefits of various program components? What information, if any, informed these decisions?

- We knew about how much we wanted to spend, we knew about how many people we wanted to participate, we knew what we wanted the participants to get out of it and we knew that we didn't want the participants to have to pay anything.
- Costs were known, but expected benefits were not well articulated
- Cost was not well thought out, much to the detriment of the program.
- Cost was not a major factor in the beginning, since this was sponsored by an individual donor. Now in fifth year, and sustainability has come up, though the donor continues to fund completely.
- We drew on the designs of about a dozen other programs, including ones in which we were participants. We have invested in development of community leaders as a foundation for other investments.
- During pilot, looked at various elements to identify which were the key drivers of change.
- We knew at the beginning that in order to drive significant community change, would need to put in significant resources and reach significant numbers of people.
- Designing this work is ongoing and still in development. We definitely are interested in developing our grants program further in part because of the low cost/high benefit of that work.
- Balancing grant support with charges to participants
- We did not cost out various components, but looked at the collective. The alumni piece evolved after a couple of classes had completed the program. We were looking for a program comparable to what for-profit executives may receive so were prepared to pay \$10k per person to get a comparable program.

- Virtually none...a number of assumptions about utility were made. No concrete plans for evaluation assessment were put in place. Over time funds were sought to do this work but too much was ex post. No comprehensive assessment has been done in the 30 years of program's existence
- Many members of the design team had over 25 years experience in the field of leadership
- Meeting with community residents and University staff helped in the design and development of the overall program and its cost structure. The overall benefit was to the individual, community and various social and civic organizations.
- In the beginning, not a lot of consideration was given. Future classes were designed based on lessons learned.
- Vague...no real data to support

5 respondents did not know.

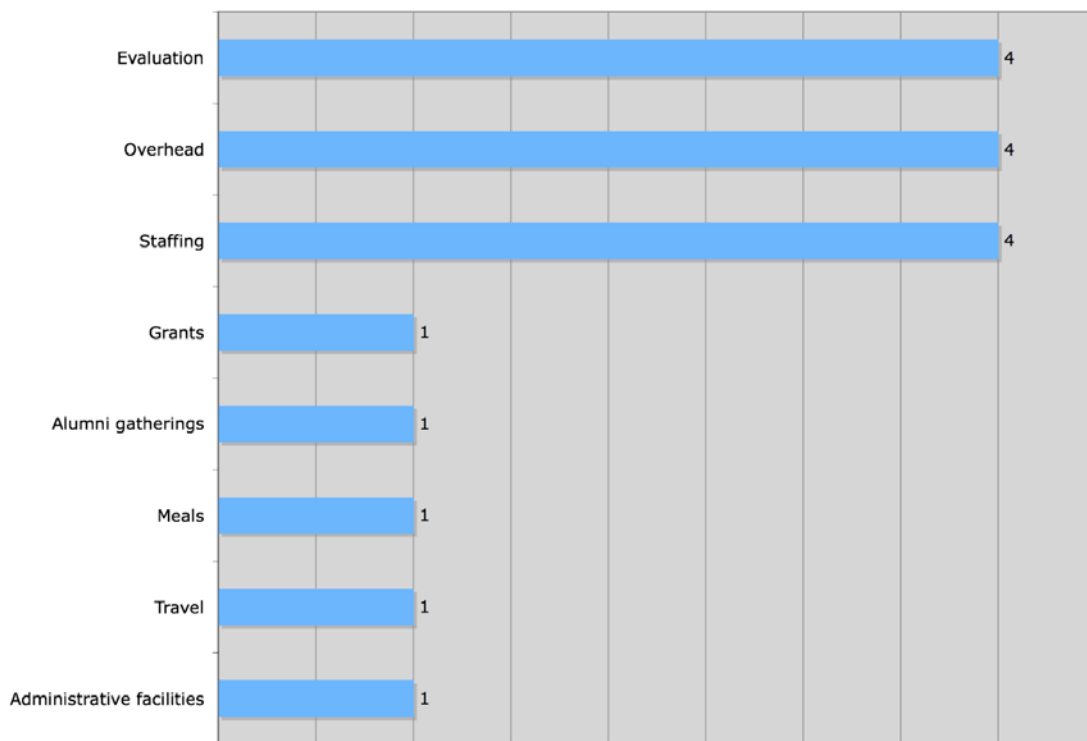
7. Have you tried to calculate the cost of delivering your program per participant?

- 65% -- Yes
- 35% -- No

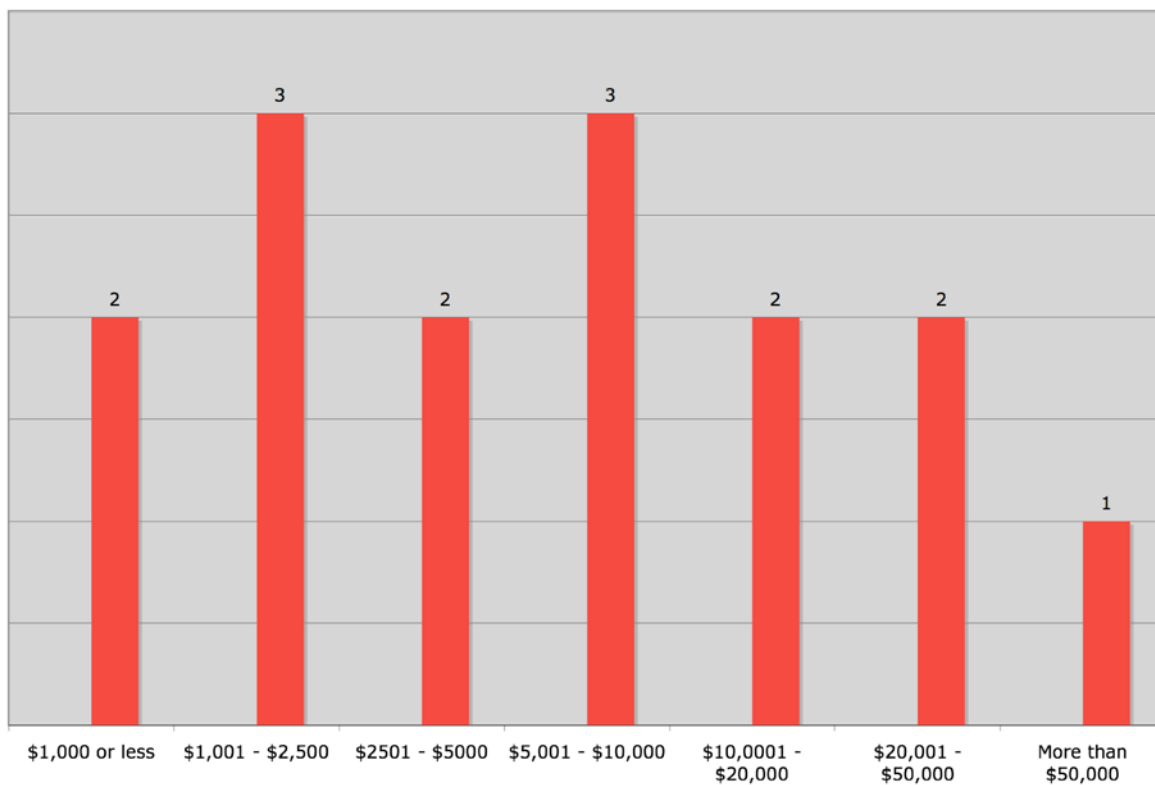
8. What was the motivation for calculating the cost of delivering your program per participant? Was it required by the funder or board?

- A few board members were interested and it wasn't hard to do.
- Useful for future program planning, design, and rethinking.
- Not required; part of some initial thinking about participants covering more of costs
- Developing a long-range budget.
- The board doesn't require it but is interested, particularly if we find ways to reduce costs.
- Board has not really demanded it, however, program staff feel it's important because we want to have a Hyundai program, not a Cadillac! Want to have a program design that is affordable and could be adopted by other funders. Want to shrink it down to its key components to get outcomes
- Board
- Not requested by the Board but seemed a useful piece of information in justifying the cost.
- Calculation of tuition
- Requested/required by funder (foundation)
- As a manager I wanted to know; also as this is a grant program we wanted participants (and their bosses) to know the value of this in-kind grant.
- Personal desire to understand; it should have been a requirement of both. It is the only way to understand the program and ensure that you are managing it like a business
- It was important to keep the cost as low a possible to attract the grassroots leaders and to receive funding.
- Not required, but it is our practice to calculate the cost.
- Would like to know program costs for program itself and for funders/potential funders

9. What costs do you exclude in your calculation?



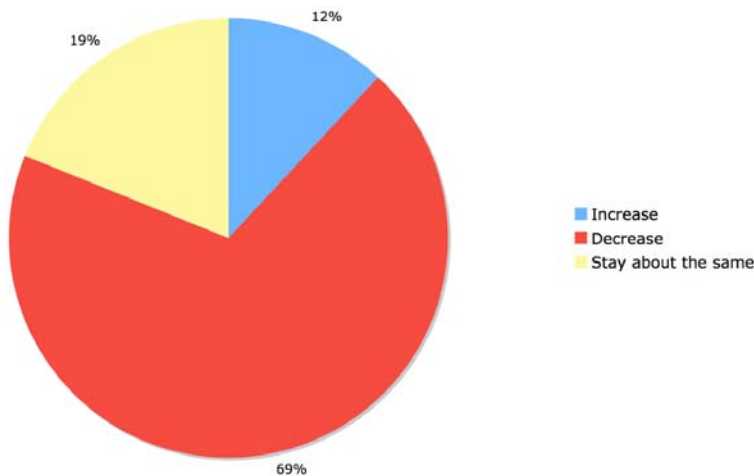
10. What is your best estimate of the cost to deliver the program per participant including overhead and program costs?



11. (For funders) What are your internal costs, beyond program implementation costs, associated with investing in a leadership program that you operate internally or through an intermediary calculated as a dollar amount per participant (e.g. staff, travel, evaluation)?

- Staff and evaluation
- Our internal costs are about 33% of the program costs.
- About 10,000 per community, or \$50 per person
- Have not calculated them
- We had the administration of this program (everything outside of the "classroom") including hotels, travel, meals, meeting space, etc. Retreat is held at one of our facilities; other sessions held at our headquarters. Our fully-loaded cost is about \$300k per year; about half to our contract; one quarter for meals, hotels, travel, etc., and another quarter for staff, convening and facilities support.
- About \$5k more per person or \$19,400

12. Do costs per participant increase or decrease with the number of participants served?

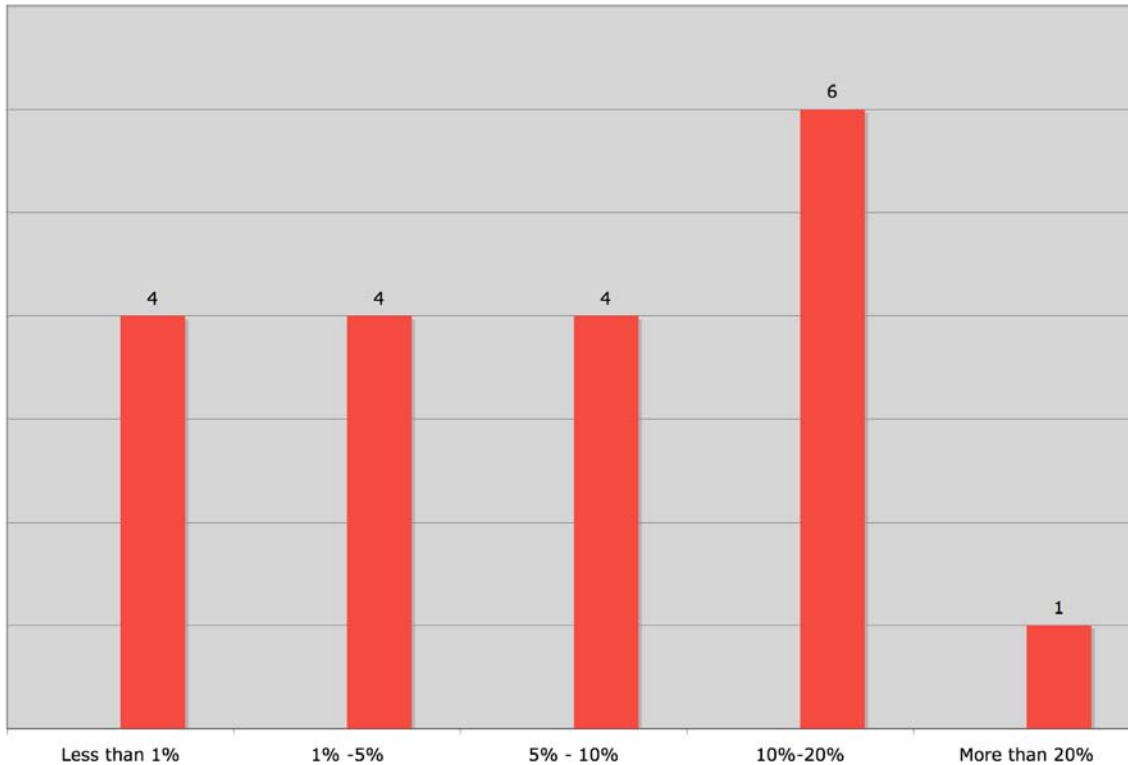


13. Why have you not tried to calculate the cost of delivering your program per participant?

- We are just now getting information on program costs.
- Initially, we did not have access to the budget as the leadership component was bundled in with other program costs.
- No need to
- Not of interest to the sponsor, plus relatively low cost effort (not a lot of travel costs, for example) since all participants come from a single area and site visits outside the area are not a part of the effort. Very different for other leadership programs we've evaluated, where cost is a major consideration for the program's sponsors
- We have calculated by participant, but we are not particularly interested in lowest possible price. We want quality.
- We have, but haven't looked at foundation staff time

- Never thought about it. It would actually not be too hard to do.
- It wasn't relevant to this program given that we were creating it for an external client who determined the number of participants
- Have tried... will keep on trying. Challenging!
- Not part of evaluation design.

15. What is your best estimate of the percentage of the program's budget that is spent on travel?



16. What is most difficult in figuring out the true cost of your program?

- It's not difficult.
- Accounting for a lot of donated time by faculty and others
- Including all of the staff time/allocation - accessing other departments' input, time associated with individual communications and troubleshooting with participants throughout the year, tendency to under-charge for actual time spent supporting the program in order to minimize budget
- Personnel costs
- Defining what is leadership development and what is not.
- Core Center staff time allocated toward program
- It would not be difficult to know program costs. Would be harder to estimate costs for participants -- opportunity costs of not working for period of participation
- Calculating number served as, besides trainees, we provide a host of services through our grants, publications and conferences. The number in 14 above is dividing our budget by the number of our leadership class graduates. But we also have participants in a range of other activities.
- Participants move in and out of the program--may participate in some activities, not others.
- Internal issues with financial reporting so hard to draw out accurate figures
- Staff time
- University indirect costs and accounting system
- Staffing
- How to consider in-kind support and sponsorship investments that off-set the "true" costs for me.
- Variability of travel expenses
- Staff time for support to graduates.

- Separating design costs and delivery costs
- Determining which costs we actually use in the cost of the training vs. supporting local leadership programs
- % of FTE's related to program, fluctuating budgets, program components.

17. What, if any, concerns or questions do you have about trying to calculate the costs and benefits of leadership programs?

- In order to do a cost-benefit analysis you have to know the dollar figure of the benefit and that's very difficult.
- Costs are easy to calculate; mid and long term benefits very hard
- Very difficult to "control" for all other factors and attribute benefits to the program; hard to assign a simple "value" to the benefits that has relevance in cash terms
- Most of the information seems to be buried in the organization.
- The time frame that we are usually assessing is much too short to know what the real community impacts are and therefore their benefit in comparison with their cost.
- I am concerned that calculating costs/person is less important than determining costs/group; division, sector, etc.
- How to measure the contribution of a given component to the overall short-term and long-term benefits
- Understanding the long-term benefits and assigning appropriate value to them – not over nor under valuing
- Failing to account for interactive effects of components – e.g. hospitality is completely important in a leadership program, in helping leaders feel valued, but usually not appreciated as contributing to outcomes
- With the board, costs are important, but so are opinions and stories. We don't have a good way to measure benefits at this point, although we have community indicators to describe our desired impacts. Putting a dollar value on most indicators, such as the reading level of 3rd grader, is not easy, or possibly important.
- Trying to measure outcomes at a community level—a wonderful challenge. We now have 150 communities blogging about their movement and evidence of outcomes. Very interesting!!!
- Benefits are likely to be long term and how do you fully capture that
- We can calculate the cost, but is there really a way to calculate the value to the individual and the communities they will serve during their career of an experience that results in personal growth, transformation, and relationship building?
- Benefits are long term and difficult to measure in dollar amounts
- Some participants do not complete/fully participate in program.
- What is the true denominator. Our program is not just focused on the individual participant but on the organization and community. Looking just at participant does not tell the true impact of the program. Is one piece of information but one needs to look at the extent those participants affect others.
- How to consider in-kind support and sponsorship investments that off-set the "true" costs for me.
- It is hard to calculate the true time of staff, and to show the true benefit of these graduates to the larger community.
- Concern: benefits from leadership programs continue past the leadership experience itself, so it's very important to collect data over a long period of time. Also concern about "quantifying" the benefits, also being able to identify and not include other effects (community, personal, etc.) that aren't related to the leadership program.
- Difficulty in disaggregating outcomes by program component.

18. From your own experience or evaluation, which program components do you think have the greatest benefit relative to their cost? What evidence have you collected?

- The training and the networking. This is based on evaluation forms that we receive from participants and from their follow up discussions with us
- Mentoring, leadership self-assessment – we have asked and tracked alumni views and experiences
- Coaching
- Workshop
- Comparison of observed and self-reported performance prior to implementing workshops and coaching versus after.
- Face-to-face relationship building that enhances collaboration development completed sectors or functional areas.
- I think experiences that build relationships that sustain over time are important; also exercises that reinforce aha moments – so effects are sustained
- Leadership training, with a community focus, changes people. It gives them the knowledge, skill and motivation to work together and get things done. When a community has a base of community leaders other investments pay off at a much higher value. The evidence is primarily from surveys and interviews with graduates over time.
- Study circles community dialogue process—involves thousands of people, builds great capacity
- LeadershipPlenty curriculum—trained community members to deliver
- Coaching (personal development and taking appropriate action)
- Peer learning especially using multi professional groups to break down professional boundaries
- Relevant workshops / seminars / training with a focus on experiential and action learning i.e. not just theory
- Peer learning and coaching grants, based on self-report from participants.
- Grants
- Projects build public health infrastructure; we have 15 years of projects
- Projects—can calculate ROI—exceed the cost per fellow to deliver
- Peer groups—low cost; many continue to meet post-fellowship
- Instruction and the facilitative learning
- Conference is highest value with networking second
- Coaching, but we do not pay our coaches a full salary. They volunteer about 60% of their time due to the nature of our participants – NGO's from developing world
- The 14 week Neighborhood Leadership Cleveland program. The evaluations and statements from the individuals who have completed the program.
- Peer learning. This is based solely on participant reports.
- From our own experience, the convening of the participants.
- Retreats. Intensive, lots of data collected, both formative and impact. Also coaching, because of intimate, intensive nature and can be done over the phone (requires many fewer resources).
- Alumni network highly valued by program participants.

19. What are the benefits/outcomes of your program that you have been able to demonstrate, measure, gather evidence for? Please specify key individual, organizational, and community benefits.

Individual	Organizational	Community
<ul style="list-style-type: none"> • Increased skills (8) • Career changes/job promotions (3) • Networking (2) • Leadership (2) • More effective change agency • Insights (2) • Knowledge (2) • Transformed behaviors • Values awareness • Improved citizen leadership • Personal development (2) • Self-knowledge/awareness (3) • Field skills • Management 	<ul style="list-style-type: none"> • Increased agency collaboration • Improvements in service, program, or policy improvements • Informed administrators • Shared vision/strategies • Organizational culture change • Collaborations • Practice changes • More effective nonprofits • Spread of ideas • Role models • Staff functioning • Sharing of leadership • Improved capacity 	<ul style="list-style-type: none"> • Increased funding for programs/agencies • Policy changes • Communities gain informed college administrators • Improved services • Better health and social outcomes • Tangible benefits to constituencies • Successful projects • Impact on health care • Improved services that contribute to outcomes • Public health infrastructure

<ul style="list-style-type: none"> • Increased recognition • Support for work efforts • Increased community involvement (2) • Confidence 	<ul style="list-style-type: none"> • Cost savings to organization • Increased funding (2) • Increased recognition • New populations on boards • More skill-based local leadership programs • Growth • Expanded focus • Engaging community 	<ul style="list-style-type: none"> • Collaboration across sectors/communities (4) • Inspiring others to lead and recognize leaders
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20. What are the benefits/outcomes of the program that you have not been able to document but feel strongly are occurring?

Individual	Organizational	Community
<ul style="list-style-type: none"> • Changes in world view • Interpersonal behaviors • Simultaneous self-agency and community involvement • Enthusiasm • Confidence • Commitment • Networks are forming around central issues • Changing views of self within health care • Professional growth • Less "burned out" • Motivation to change • Would they have done things anyway • Individual outcomes • Perception of self as leader • More confident facilitators 	<ul style="list-style-type: none"> • Effectiveness in promoting systemic change • Commitment to one another • Shifts in organizational ethos and capacity • Nonprofits are more supported by communities • Positive association between leadership development and health care • Cultural shifts • Performance • Succession planning • Have any been harmed • True impact on organizational decision-making • Distribution of leadership throughout the organization • Developing more local leaders • Leadership in agenda setting and framing issues 	<ul style="list-style-type: none"> • Collective belief in ability and worthiness • Engagement • Increased social capital • Demand for different kind of leadership • New hope is leading to strong triple bottom line • Improved health outcomes (2) • Who has been excluded • What has been missed • Connectivity of the leaders • Enhanced safety for kids • Organizations work more effectively together • Quality of life

21. Does it work to think about per participant costs if you are looking primarily at network or community impacts as the primary outcomes unit of analysis for a leadership program? What might be some other ways of thinking about costs and benefit in these cases?

- Better to think about investment and ROL
- Per participant costs are useful and necessary to consider, but cannot be the primary determinant for using a strategy or approach when the goal is community or network impact. The approach must be determined by the desired outcome, the evidence one will measure, and the needs and desires of participants & community members.
- The costs of impacts on individuals are not meaningful unless they are connected to changes in processes that influence desired outcomes beyond the individual.
- Per potential beneficiary --e.g. cost per child in the catchment area (for an effort that trained parents to reform low performing schools)
- Local community support for non-profits can be measured in dollars, volunteers, actions. Community impacts we hope show up in measurable changes in the economy, social indicators, and environment.
- Can look at it both ways if you have a way to collect data about some of the individuals as well.
- Still need cost per participant if you are to influence others to adopt your tried and tested approach. But agree that other measures should be used. It helps for administrative purposes; benefits to state and federal stakeholders would be helpful

- Social network analysis--before and after and how this network is making changes/improvements in health
- Strong interest in examining ROI and Social Network metrics for impacts
- If there is more diversity at the various tables of decision making in a community.
- We are much more interested in community impact as primary outcome
- I think it's important to demonstrate the links between individual changes and organizational and community changes in a logical way. All are important and it all begins with individual changes (without which would be NO other changes resulting from that individual's effort and their connections to others...). I think it's imperative to think differently about costs and benefits, particularly in the long run and what kinds of alumni support is necessary to keep it all going. We SEE that leadership development can make huge changes in people, and oftentimes those changes are very internal and/or personal and sometimes we discount these types of changes because 1) they're difficult to document well and especially to quantify; 2) the inferences for future changes, especially community actions, are not clear and easily tracked/documented. I think we undervalue the "transformative" aspects in search of the contributions to the community that are recognizable and quantifiable. Why isn't it just as important to see leaders "transform" into people with bigger hearts, more compassion, personal growth, spiritual changes, empowerment, connections to others... I truly think this kind of change is the most radical and longest lasting, benefiting the community in the deepest way. It's not always about DOING, but is also about BEING.
- Depends on model- if focus is on LD of individuals with anticipated organizational and/or community outcomes, cost per participant is relevant. If program is community-based, then overall costs (not costs per participant would be the better measure.

Evaluators Only

8 evaluators responded; 4 said that they had conducted a cost-benefit analysis of the program

24. What method/approach/tool did you use?

- Used cost-benefit analysis.
- Used discounted cash-flow method.
- Not me personally but a colleague - estimating cost per programme and per participant. Also looking at resources leveraged in by participants during the programme e.g additional funding, staff time etc
- Two bases -- financial impact and community evaluations questionnaires
- Individual/team assessments (our leadership program focuses on teams of 2-3 people), team functioning questionnaires, home team assessments, learning plans for individuals and teams; longitudinal surveys (to get at the question of what happens/what are the impacts after the leadership program is over?). Cost of program per person/benefits.

25. In what ways was it a valuable inquiry? For whom?

- Provided training organization with needed information.
- Opened up a debate about this issue and led to independent evaluation being commissioned to explore further
- I think they are too self-serving. Difficult for community to ask hard questions about itself. The best focused on how to "improve an already good/better/excellent" program
- Valuable for stakeholders, including Fellows.

26. What challenges did you encounter? How did you try to address those challenges?

- Gathering salary information. Was able to get approximate data.
- Unclear financial reporting made very difficult to calculate exact costs

- Adequacy of responses, biases introduced by responses (not hearing from disaffected individuals)
- Three inquiries requesting response
- Longitudinal survey participation has been a challenge. Addressed with incentives and follow up contact.

27. How did the client use what they learned from this type of evaluation?

- Used information to justify program.
- Hasn't so far
- Some used it for program improvement, some for seeking additional support some for "proving" value to community
- Self reflection, sometimes followed by more application/effort.

28. What, if anything, gets lost when this type of cost/benefit evaluation is prioritized?

- Long term benefit because our program is so new (only two years old)
- So, has the program had any negative impacts?
- Attribution is complicated and always shifting (secular and market trends). Often, by the time these evaluations are completed, other determined may be more operative.
- It's good if you do the algorithm -- that is, lay out all the costs and all the potential benefits -- but not if you spend more resources of calculating the actual numbers that understanding the trade-offs -- the conceptual work is more important than the numbers
- Needs to be part of a wider evaluation incorporating softer outcomes and analysis
- What I affectionately refer to as "white space" what changes happen as a result of the interactions? What projects come into creation because "X" got to know "Y" as a result of such programs. That's why i am interested in the social network metrics
- Haven't conducted this type of evaluation, but it is difficult to quantify organizational and community-wide benefits.