RESEARCH PROJECT LIFECYCLE

Benefits Assessment

Stage: Final Analysis · Previous template: Research Outcomes Report · Next template: Gate 4 Review and Root Cause Analysis

How to use this form

The Benefits Assessment sets out **what the treatment costs and what it delivers**, so decision-makers can judge whether to continue, scale up or stop. It takes **two pages**.

- **Who completes it:** the Project Lead, with input from finance or performance colleagues.
- **When:** in Final Analysis, alongside the Research Outcomes Report.
- **Use the findings, not hopes.** Base benefits on the results in the Research Outcomes Report. If the result was not statistically significant, say so, and do not claim the benefit.
- **Be realistic about savings.** Staff hours released are a real benefit, but they are rarely cash in the bank. Separate cashable savings from time and capacity freed up.
- **Show your workings.** State each assumption, so others can check it or test a different one.

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A. The project

Field	Your answer
A1. Project title *(essential)* As on the Full Research Plan or protocol.	
A2. Project reference From the Research Portfolio Register.	
A3. Project Lead *(essential)* Name and role.	
A4. Finance or performance input Name and role of the person who checked the figures.	
A5. Period covered from *(essential)*	Date: ____ / ____ / _____
A6. Period covered to *(essential)*	Date: ____ / ____ / _____

B. Costs

Field	Your answer
B1. Cost of delivering the treatment *(essential)* The total cost and the cost per person treated, including staff time, materials and any partner costs.	
B2. Cost of business as usual What the control group received would have cost for the same number of people, for comparison.	
B3. Cost of the research *(essential)* The cost of designing, tracking, analysing and reporting the study. Keep this separate from delivery costs.	

C. Reach and outcomes

Field	Your answer
C1. Number of people treated *(essential)* From the participant flow in the Research Outcomes Report.	
C2. Change in the outcome *(essential)* The difference found, and whether it was statistically significant. Take this from the Research Outcomes Report.	
C3. Outcomes gained or harms avoided The difference turned into numbers. For example: 40 more people attending, or 25 fewer repeat incidents.	

D. Value

Field	Your answer
D1. Value stream map *(essential)* The route a person takes through the system, before and after the change. Show where time, cost or harm is added or removed. Attach the map.	
D2. Realistic savings *(essential)* Pick one, then describe them. For example: staff hours released, or demand avoided elsewhere.	☐ Cashable savings ☐ Non-cashable savings, such as time released ☐ Both ☐ None identified **Notes:**
D3. Cost per outcome *(essential)* The extra cost of the treatment for each extra outcome gained or harm avoided.	
D4. Wider benefits not costed For example: wellbeing, trust, safety or fairness. Say how you know.	
D5. Confidence in the estimate *(essential)* Pick one, then list the main assumptions. Say what would change the estimate most.	☐ High ☐ Medium ☐ Low **Notes:**

E. Sustaining or scaling

Field	Your answer
E1. Cost to continue at the current scale *(essential)* The cost per year to keep delivering it as it is.	
E2. Cost to scale up The cost to deliver it more widely, and what that would reach.	

Field	Your answer
E3. Who would pay *(essential)* The budget or organisation that would fund it after the study.	
E4. Risks to the benefits For example: effects fading over time, or delivery quality falling when it is scaled up.	

F. Efficiency improvements for implementation

Trials are often less efficient than routine delivery can be. They include extra checks, one-off set-up costs, and learning as you go. Use this section to record what could be done more efficiently if the treatment is implemented, and what that might cost.

Important: the estimates in this section are not part of the evidenced costs and benefits above. They show potential additional value that could be achieved after the trial, if implementation goes ahead. They have not been tested.

Field	Your answer
F1. What could be delivered more efficiently? *(essential)* Based on what was learnt during the trial. For example: steps that could be removed, combined or automated, staff time that could be reduced, or set-up costs that will not be repeated.	
F2. Changes proposed *(essential)* Each change, what it involves, and who would need to agree it.	
F3. Estimated cost of delivery with these changes *(essential)* The estimated total cost and cost per person, worked out on the same basis as B1 so the two can be compared.	

Field	Your answer
F4. Estimated additional value The difference from the evidenced cost in B1, and what it could mean for the cost per outcome. Label every figure as an estimate.	
F5. Assumptions and risks *(essential)* What the estimate depends on. Could any change reduce the effect found in the trial? For example: less contact time may make the treatment less effective.	
F6. Confidence in the estimate *(essential)* Pick one, then explain.	☐ High ☐ Medium ☐ Low **Notes:**
F7. Should the changes be tested? *(essential)* Pick one. Changes that could affect how well the treatment works should be tested before full implementation, for example in the next iteration of research.	☐ No: low risk, implement and monitor ☐ Yes: test before full implementation ☐ Unsure: discuss at the implementation decision

G. Sign-off

Field	Your answer
G1. Completed by *(essential)* Project Lead name and role.	
G2. Figures checked by Finance or performance name and role.	
G3. Date *(essential)*	Date: ____ / ____ / _____

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