

Benefit-Cost Analysis Reference Case: Principles, Methods, and Standards Call for Case Studies

Deadline: May 31, 2018

The Bill and Melinda Gates Foundation is supporting the development of guidance for economic evaluation of investments in health and development, particularly in low- and middle-income countries. As part of this effort, we are developing [guidelines for conducting benefit-cost analysis](#). These guidelines will complement and supplement the existing [International Decision Support Initiative \(iDSI\) Reference Case](#), which provides general guidance on the overall framework for economic evaluation as well as specific guidance on the conduct of cost-effectiveness analysis. More information on the project is available on our [website](#).

To support this effort, we are soliciting case studies that demonstrate and evaluate application of the recommendations of the methods papers listed below, focusing on the policy areas that are priorities for the [Gates Foundation](#). We are particularly interested in submissions involving authors who live and work in low- and middle-income countries, to test the feasibility and usefulness of these recommendations in these contexts. We will use these case studies to illustrate and refine our recommendations, and will feature selected case studies on our website. We encourage authors to also submit their case studies for publication elsewhere.

If you are interested in submitting your case study for consideration, please ensure that it follows the guidelines described in this note, and use the file attachment option in our online [comments form](#) to submit it as a PDF. The case studies will be reviewed by selected experts and considered for posting on our website and for use in demonstrating the application of the guidance. We expect that these case studies will largely build on existing benefit-cost analyses or cost-effectiveness analyses, rather than involving significant new work. Unfortunately, we are not able to provide funding to support these case studies.

Completed case studies must be received no later than **May 31, 2018**.

The methods papers are listed below; the most recent versions can be downloaded [here](#).

- **Valuing Mortality Risk Reductions in Global Benefit-Cost Analysis**, Lisa A. Robinson, James K. Hammitt, and Lucy O’Keeffe (Harvard University)
- **Valuing Nonfatal Health Risk Reductions in Global Benefit-Cost Analysis**, Lisa A. Robinson and James K. Hammitt (Harvard University)
- **Accounting for the Timing of Costs and Benefits in the Evaluation of Health Projects Relevant to LMICs**, Karl Claxton (University of York)
- **Valuing Changes in Time Use in Low- and Middle-Income Countries**, Dale Whittington (University of North Carolina) and Joseph Cook (Washington State University)
- **Assessing the Economy-wide Effects of Health and Environmental Interventions in Support of Benefit-Cost Analysis**, Kenneth M. Strzepek (MIT), Collins Amanywa (Ugandan Ministry of Water and Environment), and James E. Neumann (Industrial Economics)

- **Assessing the Distribution of Impacts in Global Benefit-Cost Analysis**, Lisa A. Robinson and James K. Hammitt (Harvard University) with supplement by Matthew Adler (Duke University)
- **Valuing Protection against Health-Related Financial Risks**, Dean Jamison (University of California – San Francisco) and Jonathan Skinner (Dartmouth College)

As a default, a real discount rate of 3 percent should be used in the case studies, consistent with the recommendations of the iDSI Reference Case. Authors may wish to also consider alternative rates; for example, as discussed in the methods paper on “Accounting for the Timing of Costs and Benefits” drafted by Karl Claxton. More generally, the case studies should follow the principals, methodological specifications, and reporting standards in the iDSI Reference Case to the extent that they are relevant to the particular case study and to benefit-cost analysis more generally. The iDSI Reference Case is summarized in Appendix A of our [scoping report](#) and described in more detail on the [iDSI website](#).

The goal of the case studies is to demonstrate the effects of the different choices discussed in the methods papers and to test their feasibility. The results will then be used to support the creation of the benefit-cost reference case guidelines.

To support this effort, the case studies must demonstrate clear communication of the analytic approach, results, and uncertainties using nontechnical language. Each case study should address the following:

- The framing of the analysis, including the problem being addressed, the policy option(s) considered, and the determination of standing or perspective (described in Section 1.1 of the May [scoping report](#)).
- The analytic approach, including the baseline assumptions and predicted responses to the policy option(s), the approach for estimating costs, the approach for estimating benefits, and the approach for estimating the distribution of the effects.
- The analytic results, including the estimates of costs, benefits, and net benefits, as well as information on distribution. Uncertainty should be addressed both qualitatively and quantitatively.

We expect each case study will be no longer than about 5,000 words (excluding the reference list). They should reference the methods papers for more information on the approaches they are designed to illustrate as well as other sources for more detailed technical information. Additional technical materials may also be included as appendices.

Questions? Please write to us at bcaguidelines@hsph.harvard.edu.