



Demonstrate the Value of Healthcare Saudi Commission For Health Specialties

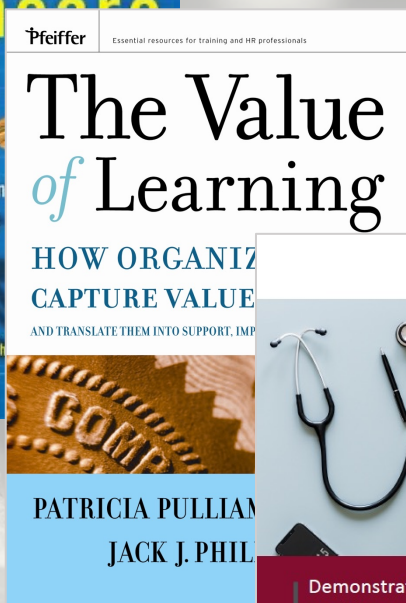
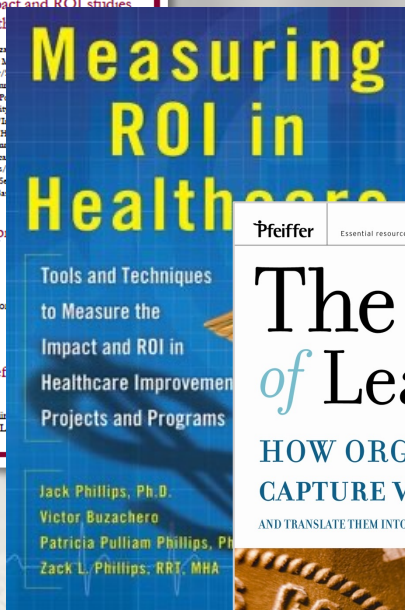
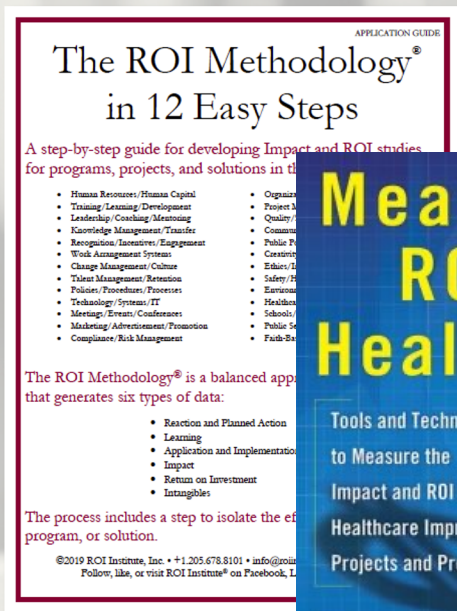
Objectives

After completing this session, participants should:

1. Be able to describe the five levels of outcomes, objectives, and needs.
2. Be able to identify the 12 steps in the ROI Methodology.
3. Build support for the ROI Methodology.
4. Plan and implement future ROI projects.
5. Change the way they propose, implement, and evaluate programs, processes and initiatives.



Resources

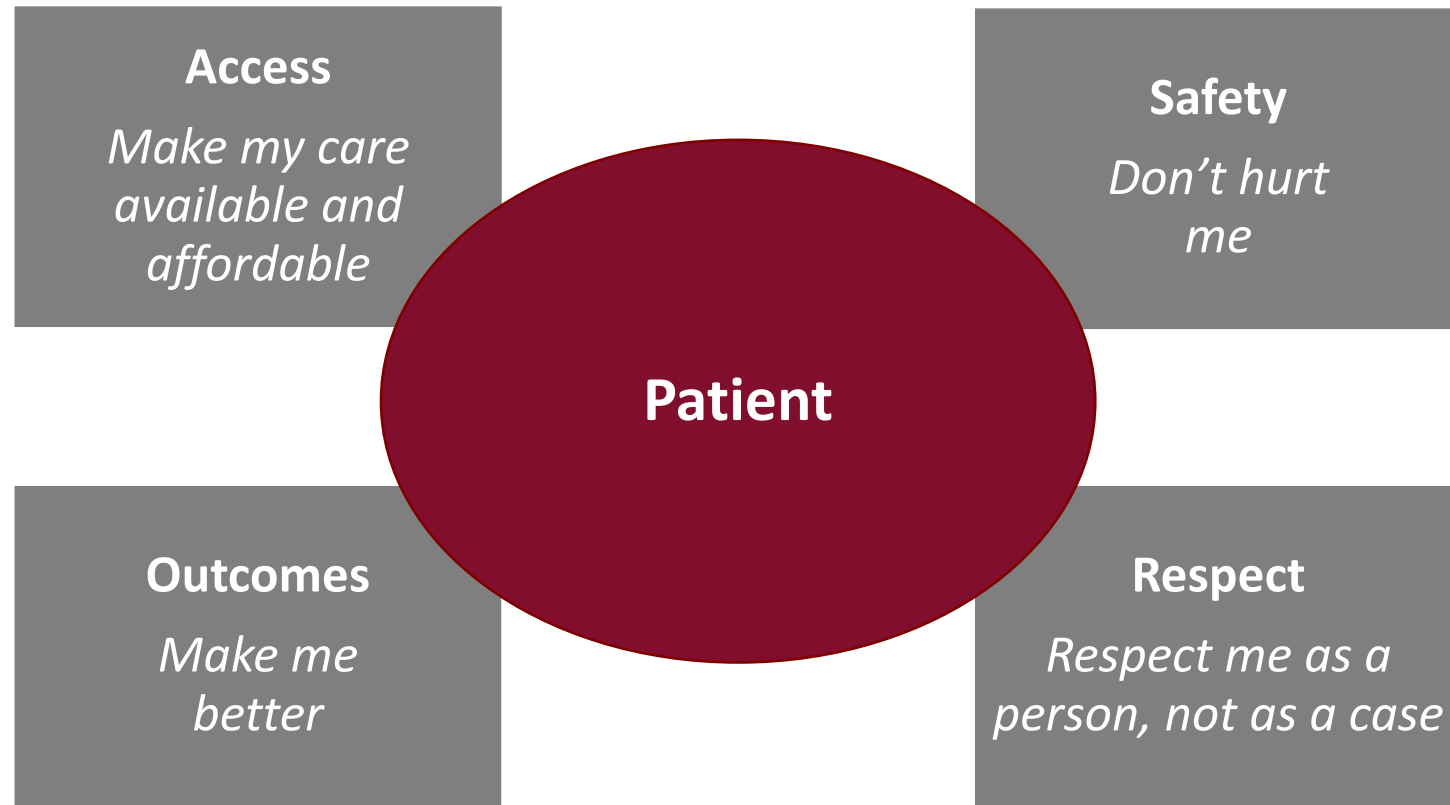


The Need for ROI is Now

- Healthcare expenditures will continue to grow, even after the pandemic.
- Executives and top administrators must understand the value of healthcare projects, programs, and initiatives in a straightforward and meaningful format.
- The ability to show bottom-line accountability while maintaining quality and efficiencies will be the key to survival in this industry.



Patient Quality Concerns



ROI Methodology[®]

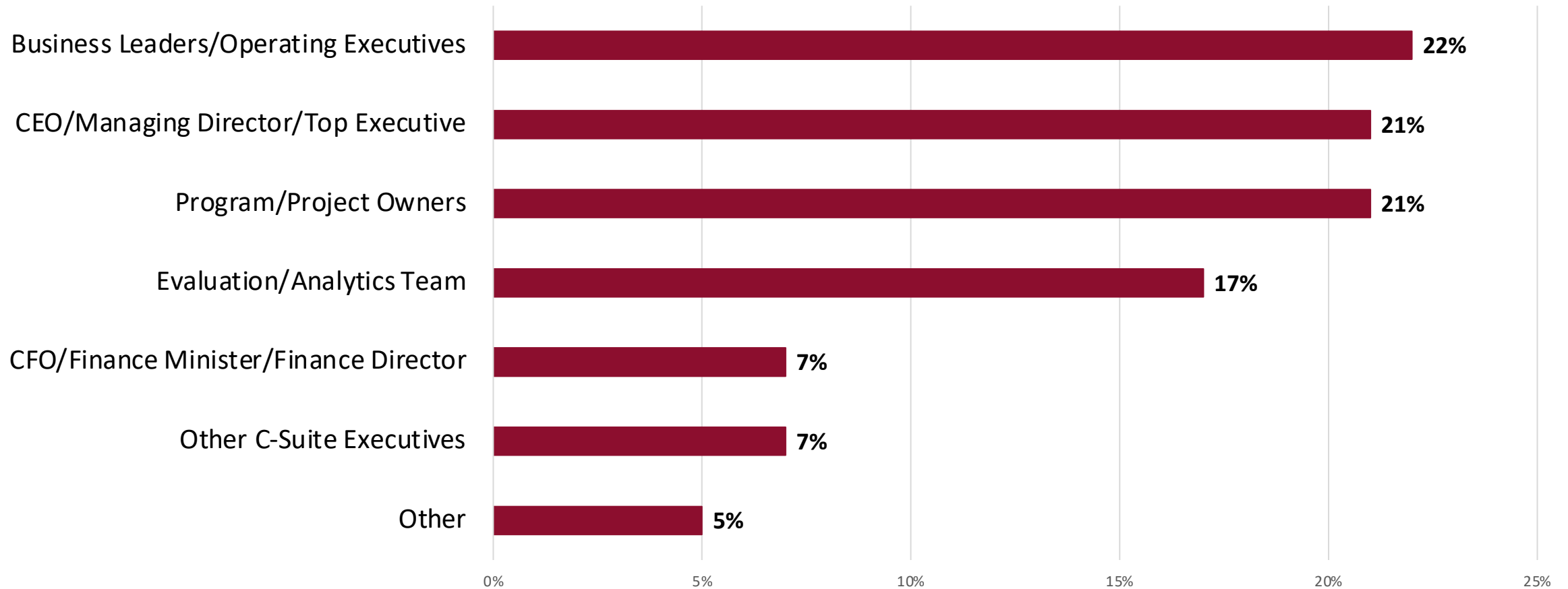
- Most used evaluation system in the world
- Endorsed by United Nations with a UN General Assembly resolution in 2008
- Endorsed by 26 federal governments
- Used by over 300 health care systems
- Used by over 150 colleges and universities
- Used by three-fourths of Fortune 500 organizations
- Used by major foundations such as the Gates Foundation



ROI is Appropriate for Many Fields

- Human Resources/Human Capital
- Training/Learning/Development
- Leadership/Coaching/Mentoring
- Knowledge Management/Transfer
- Recognition/Incentives/Engagement
- Work Arrangement/Systems
- Change Management/Culture
- Talent Management/Retention
- Policies/Procedures/Processes
- Technology/Systems/IT
- Meetings/Events/Conferences
- Marketing/Advertisement/Promotion
- Organization Development/Consulting
- Project Management Solutions
- Quality/Six Sigma/Lean Engineering
- Communications/Public Relations
- Public Policy/Social Programs
- Creativity/Innovation
- Ethics/Integrity
- Safety/Health/Fitness Programs
- Environment/Sustainability
- Healthcare Initiatives
- Schools/Colleges/Universities
- Public Sector/Nonprofits
- Faith-Based Programs
- Compliance/Risk Management

Who drives ROI in organizations?



n = 246



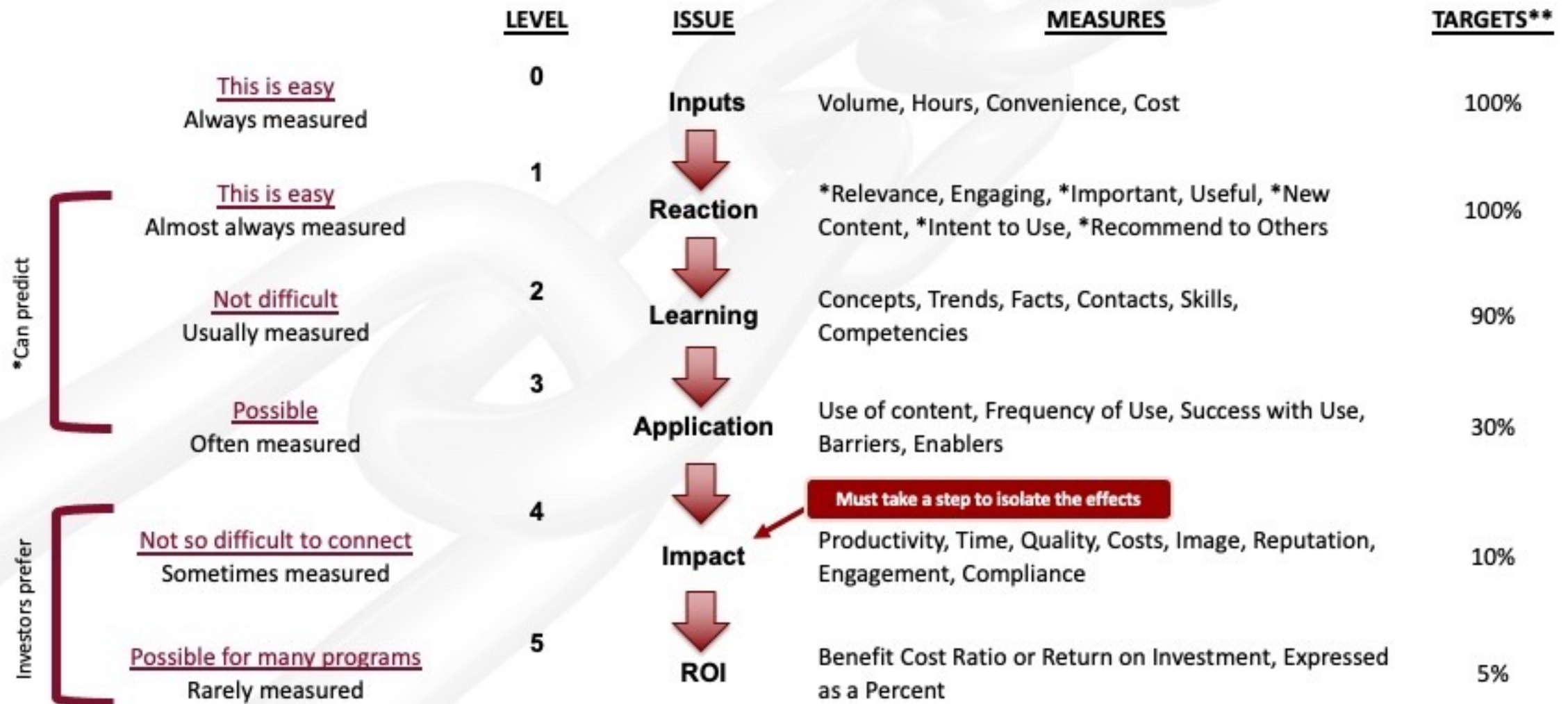
What is Your Experience with ROI? (Select all that apply.)

- A. No experience with it.
- B. It's been suggested, but no action has been taken.
- C. I have attempted it.
- D. I have conducted an ROI study.
- E. I wish ROI would go away.

ROI Methodology Levels of Evaluation

Levels of Evaluation	Measurement Focus	Typical Measures
0. Inputs & Indicators	The input into the project in terms of scope, volume, efficiencies, costs	Participants, Hours, Costs, Timing
1. Reaction & Planned Action	Measures participant satisfaction and captures planned actions, if appropriate	Relevance, Importance, Usefulness, Appropriateness, Intent to use, Motivation to take action
2. Learning & Confidence	Measures changes in knowledge, skills, and attitudes	Skills, Knowledge, Capacity, Competencies, Confidence, Contacts
3. Application & Implementation	Measures changes in behavior or actions	Extent of use, Task completion, Frequency of use, Actions completed, Success with use, Barriers to use, Enablers to use
4. Business Impact	Measures changes in business impact variables	Productivity, Revenue, Quality, Time, Efficiency, Customer Satisfaction, Employee Engagement
5. Return on Investment	Compares project benefits to the costs	Benefit-Cost Ratio (BCR), ROI%, Payback Period

The Value Chain



**Best Practice: Percent of programs evaluated at this level each year.

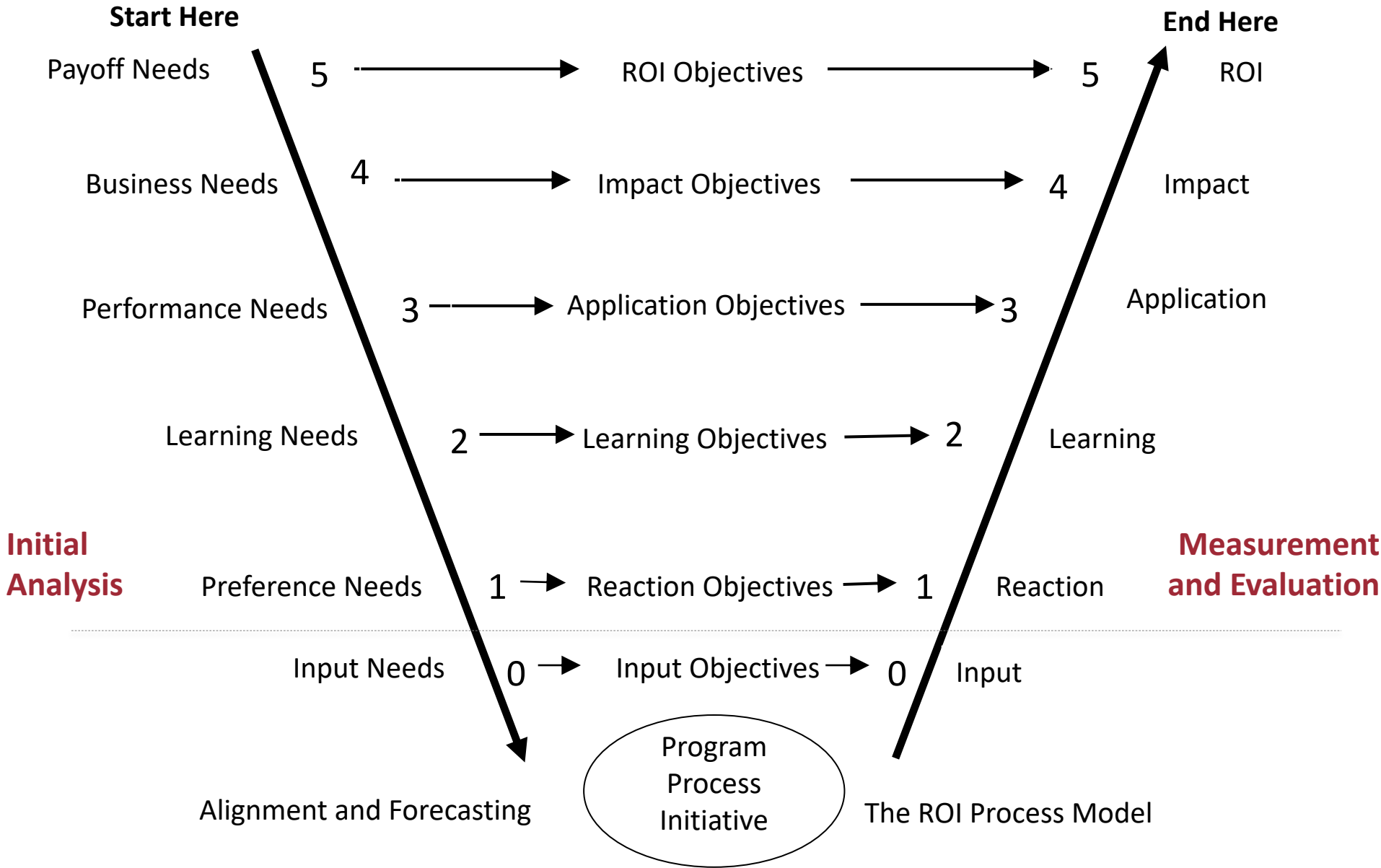
What is ROI?

$$\text{BCR} = \frac{\text{Program Benefits}}{\text{Program Costs}}$$

$$\text{ROI} = \frac{\text{Benefits} - \text{Costs}}{\text{Costs}} \times 100$$



Alignment Model





Level		Recommended % of Programs	**Benchmarking %
0	Input	100%	100%
1	Reaction	100%	80%
2	Learning	80-90%	70%
3	Application	30%	49%
4	Impact	10%	37%
5	ROI	5%	18%

*Percentage of programs evaluated at each level each year

**Benchmarking 2020

What is your status?

Characteristics of Programs Suitable for Impact & ROI

Cost of the program

Linkage of program to operational goals and issues

Importance of program to strategic objectives

Top executive interest in the evaluation

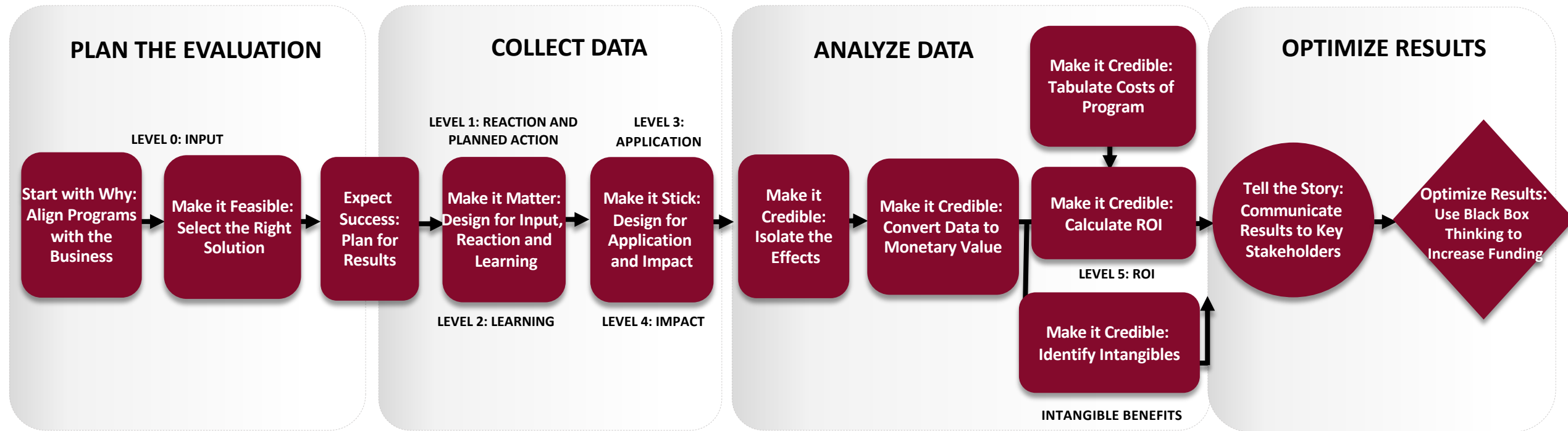
Visibility of the program

Size of target audience

Investment of time required

The ROI Methodology® Process Model

Designing for the Delivery of Business Results



Evaluation Levels with Objectives

After implementing the program, participants should:

1. Increase MRI patients served by 20%.
2. Decrease the average time patients stay in the ICU.
3. Perceive the new medical procedure as necessary.
4. Implement the 6 steps in the ERACS pathway with every colorectal surgery.
5. Achieve a 20% ROI one year after implementation of flexible work system.
6. Be able to describe the 10 elements of the safety program.
7. Conduct a proper investigation using the seven-step process in 95% of complaint situations.
8. Decrease physician overtime in the ER department .
9. Score an average of 75 or better on new strategy quiz.
10. Patients know how to access care and how to participate in and improve care.

- | | |
|----------|--------------------|
| 1 | Reaction |
| 2 | Learning |
| 3 | Application |
| 4 | Impact |
| 5 | ROI |

Evaluation Levels with Objectives

After implementing the program, participants should:

- | | | |
|-----|---|---|
| 1. | Increase MRI patients served by 20%. | 4 |
| 2. | Decrease the average time patients stay in the ICU. | 4 |
| 3. | Perceive the new medical procedure as necessary. | 1 |
| 4. | Implement the 6 steps in the ERACS pathway with every colorectal surgery. | 3 |
| 5. | Achieve a 20% ROI one year after implementation of flexible work system. | 5 |
| 6. | Be able to describe the 10 elements of the safety program. | 2 |
| 7. | Conduct a proper investigation using the seven-step process in 95% of complaint situations. | 3 |
| 8. | Decrease physician overtime in the ER department . | 4 |
| 9. | Score an average of 75 or better on new strategy quiz. | 2 |
| 10. | Patients know how to access care and how to participate in and improve care. | 2 |

- | | |
|---|-------------|
| 1 | Reaction |
| 2 | Learning |
| 3 | Application |
| 4 | Impact |
| 5 | ROI |

Guiding Principles

1. When conducting a higher-level evaluation, collect data at lower levels.
2. When planning a higher-level evaluation, the previous level of evaluation is not required to be comprehensive.
3. When collecting and analyzing data, use only the most credible sources.
4. When analyzing data, select the most conservative alternative for calculations.
5. Use at least one method to isolate the effects of a project.
6. If no improvement data are available for a population or from a specific source, assume that little or no improvement has occurred.
7. Adjust estimates of improvement for potential errors of estimation.
8. Avoid use of extreme data items and unsupported claims when calculating ROI.
9. Use only the first year of annual benefits in ROI analysis of short-term solutions.
10. Fully load all costs of a solution, project, or program when analyzing ROI.
11. Intangible measures are defined as measures that are purposely not converted to monetary values.
12. Communicate the results of ROI Methodology to all key stakeholders.



Intangibles

- Nurse engagement
- Awards
- Brand awareness
- Career minded
- Caring
- Collaboration
- Communication
- Conflicts
- Patient complaints
- Patient access
- Social consciousness
- Image
- Innovation
- Job satisfaction
- Physician Leadership
- Networking
- Organizational climate
- Organizational commitment
- Reputation
- Stress
- Talent
- Teamwork



ROI Myths

- ROI is too complex for most users.
- ROI is too expensive, consuming too many critical resources.
- If senior management does not require ROI, there is no need to pursue it.
- ROI is a passing fad.
- ROI is too subjective.
- ROI is for post-analysis only.



Benefits of Conducting ROI Studies

- Justify/defend budgets.
- Align projects to business needs.
- Show contributions of selected projects.
- Earn respect of senior management/ administrators.
- Build staff morale.
- Improve support for projects.
- Improve projects with process improvement.
- Identify inefficient projects that need to be redesigned or eliminated.
- Identify successful projects that can be implemented in other areas.

Next Steps



Assess your readiness for ROI.



Identify stakeholders and their data needs.



Determine the purpose of your evaluation practice.



Identify programs suitable for ROI.



Develop capability in the ROI Methodology.



What is the Best Way to Learn the ROI Methodology?

1. Briefings
2. Awareness workshops
3. ROI Certification— a comprehensive process involving:
 - Prework
 - Intensive learning program to complete ROI study
 - Workbook, reference books, job aids
 - Weekly live coaching sessions
 - Feedback and approval of study
 - Right to use materials Internally
 - Certified ROI Professional® (CRP) designation
 - Access to ROI Institute resource library



Questions?

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