

Phillips ROI Methodology Types and Levels of Data

Level of Evaluation		Measurement Focus	Typical Measures	Questions	Data Sources
0	Inputs and Indicators ↓	Inputs into the program, including indicators representing scope, volumes, costs, and efficiencies	- Types of topics, content - Number of people - Training capacity - Hours of involvement - Costs	- What content do we need to teach to get the desired level of job performance? Business outcomes? - Who needs this learning? How many participants? - How should the learning be delivered to participants? - How long will it take to deliver the learning program? - What will it cost to provide the learning program?	Analysts, planners, designers, developers, facilitators, supervisors, managers, employees (targeted learners)
1	Reaction and Planned Action ↓	Participant reaction to the program, including plans to take action to implement what was learned on-the-job	- Relevance - Importance - Usefulness - Appropriateness - Intent to use on the job	- How relevant is the learning to on the job performance? - How important is the learning to job performance? - How useful is the learning to job performance? - How appropriate is the learning to job performance? - How do participants plan to use the learning on the job?	Participants
2	Learning and Confidence ↓	Learning how to use the content and materials, including the confidence to use what was learned upon returning to work	- Skills - Knowledge - Capacity - Competencies - Confidence	- Do participants know what we need them to know? - Can the participants perform what they learned to acceptable standards for quality? Timeliness? Other? - Are the participants confident enough to perform what they learned on the job?	Facilitators, participants
3	Application and Implementation ↓	Use of content and materials in the work environment, including progress with implementation	- Extent of use - Task completion - Frequency of use - Actions completed - Success with use - Barriers to use - Enablers to use	- To what extent is the learning applied at work? - Is the learning applied correctly, as taught or intended? - How frequently is the learning applied at work? - What planned actions have been completed by program participants/completers? - How has participant/completer performance changed as a result of the learning program? - What prevents the learning from being used on the job? - What facilitates the application of the learning on the job?	Participants, supervisors, managers, evaluators
4	Impact and Consequences ↓	The consequences of the use of the content and materials expressed as business impact measures	- Productivity - Revenue - Quality - Time - Efficiency - Customer satisfaction - Employee engagement	- How did the on the job application of learning impact business outcomes, goals and objectives? - Were the desired outcomes achieved? - How do post learning program business outcomes compare to business outcomes before the program? - What were the intangible benefits?	Participants, supervisors, managers, evaluators
5	Return On Investment (ROI)	Comparison of monetary benefits from the program to program costs	- Benefit/cost ratio (BCR) - ROI (%) - Payback period	- What did the learning program cost in total? - What contribution did the program make to business outcomes? Can we isolate the program impact? - Do the program monetary benefits outweigh its costs?	Evaluators, managers, supervisors, participants/completers

Source: Adapted from *The Value of Learning: How Organizations Capture Value and ROI and Translate them into Support, Improvement, and Funds*. Patricia Pulliam Phillips, Ph.D., Jack J. Phillips, Ph.D., Pfeiffer, San Francisco, CA 2007.