





International Society for
Performance Improvement



Show the Value of What You Do: Measuring and Achieving Success in Any Endeavor

Patti P. Phillips, Ph.D., CEO, ROI Institute, Inc.

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1

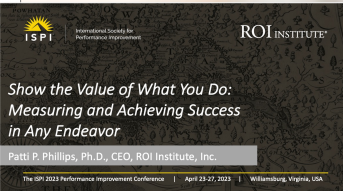


Resources





SCAN ME



2

Objectives

After this session, we hope you will use what you learn to:

- Change your approach to defining and achieving success while improving future results.
- Achieve success by delivering outcomes that matter.
- Add value to your work, your organization, and your community.



3

3

The Value of Chaplaincy

Doug Stewart, chief chaplain at Memorial Regional Health System in Belleville, Illinois, knew that failure to connect the work of chaplaincy to organization outcomes would put funding for chaplaincy intervention at risk. Length of stay and patient satisfaction are particularly important to the healthcare organization.

To make chaplaincy intervention in the ICU work, he had to ensure that chaplains interacted with the patient, family and medical team. He also knew that the medical team and the chaplain had to know the role of the chaplain and how the chaplain would interact in the ICU. And of course, the chaplain had to have the right skills.

Additionally, the ICU medical team had to buy into the integration of the chaplain in the ICU.

What measures of value do you observe and to whom are these measures important?



4

Handout page 2

4

Measures of Value

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

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Katzell developed four steps of training evaluation; Kirkpatrick wrote about four steps of training evaluation; Phillips added economic theory and operationalized the framework by adding process and standards and applying it in practice.

Handout page 3

5

5

What is ROI?

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

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



Handout page 3

6

6

What is ROI?

$$\text{BCR} = \frac{\$750,000}{\$425,000}$$

$$\text{ROI} = \frac{\$750,000 - \$425,000}{\$425,000} \times 100$$



7

7

Five-Level Evaluation Framework

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
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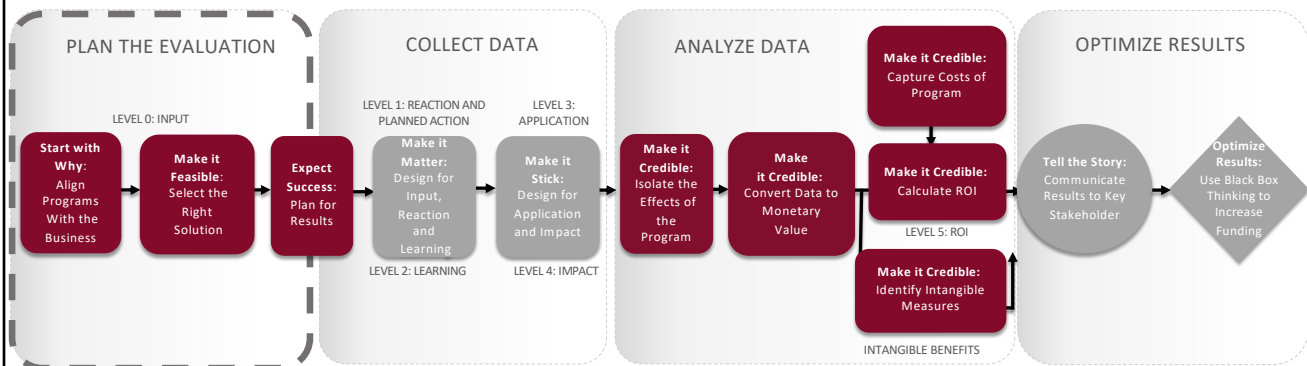
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8

8

The ROI Methodology Process Model

Designing for the Delivery of Business Results



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9

9

Matching Evaluation Levels with Objectives

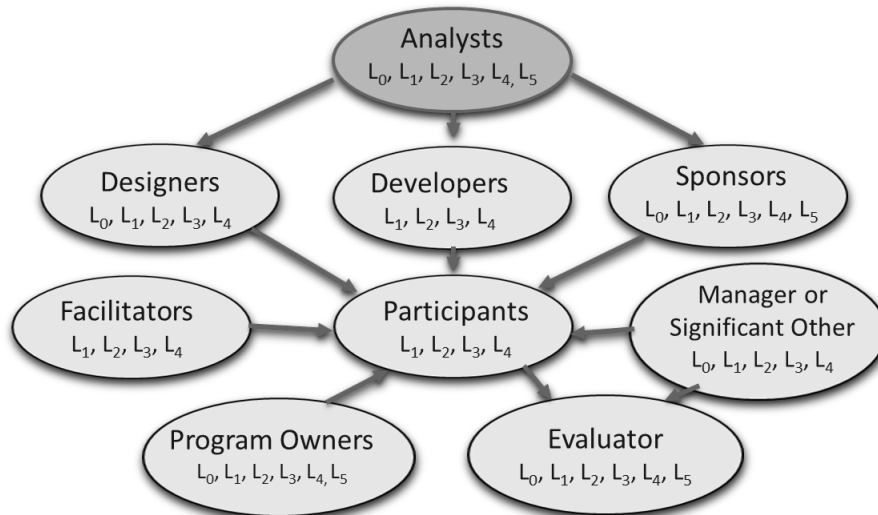
After completing this program, participants should:

1.	Decrease citizen complaints by 20% in one year.	
2.	Use problem-solving skills to uncover product defect causes.	
3.	Be able to demonstrate the five steps to calm an upset customer.	
4.	Rate the facilitator 4 out of 5 on presentation skills.	
5.	Decrease the amount of time required to develop a proposal.	
6.	Achieve a 20% ROI one year after program implementation of a sales incentive system.	
7.	Perceive the content to be relevant to their actual situations (4.5 out of 5).	
8.	Decrease security breaches by 25% in six months.	
9.	Conduct a proper investigation using the seven-step process in 95% of complaint situations.	
10.	Score an average of 75 or better on new strategy quiz.	
11.	Complete a disclosure form each year as part of the new ethics policy.	
12.	Use all 10 negotiation skills in at least 50% of negotiation situations.	

10

10

Objectives define expectations.



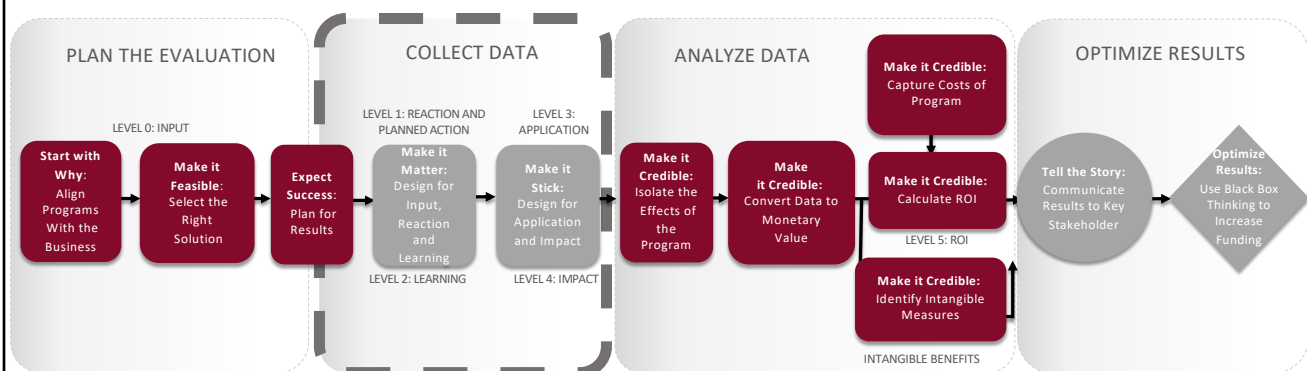
Handout page 4

11

11

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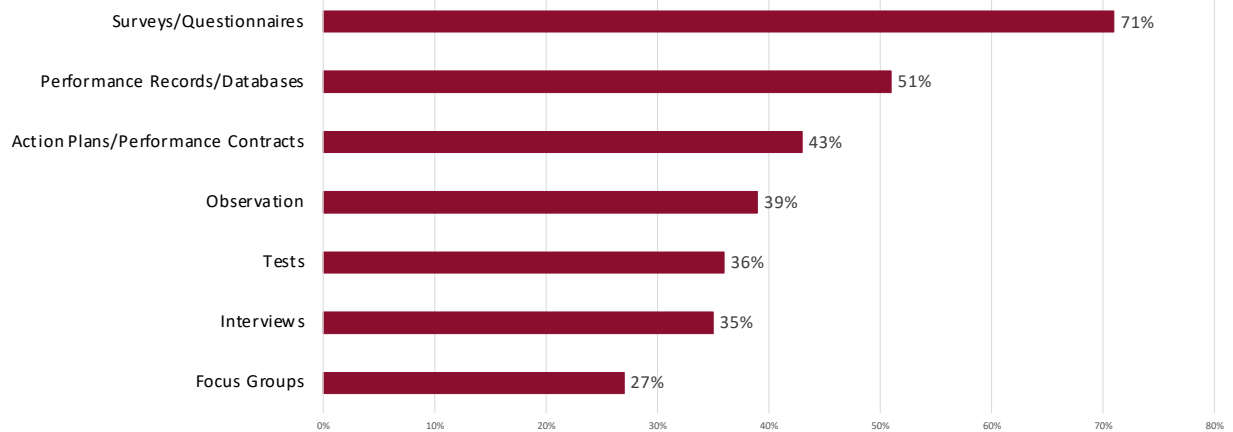


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12

12



*Survey of Users, N = 246

Data Collection Methods

13

13

Renew America Together: Civility Leadership Institute

Founder: General Wesley Clark
Executive Director: Mary-Lee Smith
Facilitator: Sharon Lovoy
Evaluation Team: ROI Institute

Sometimes a project requires data collection at multiple times for a long period of time. This can seem overwhelming. The key is to build it into the process.

Program Design



12-month open-enrollment virtual program

- 12 months online
- Monthly skill-building (first six months)
- Special guest speakers (second six months)



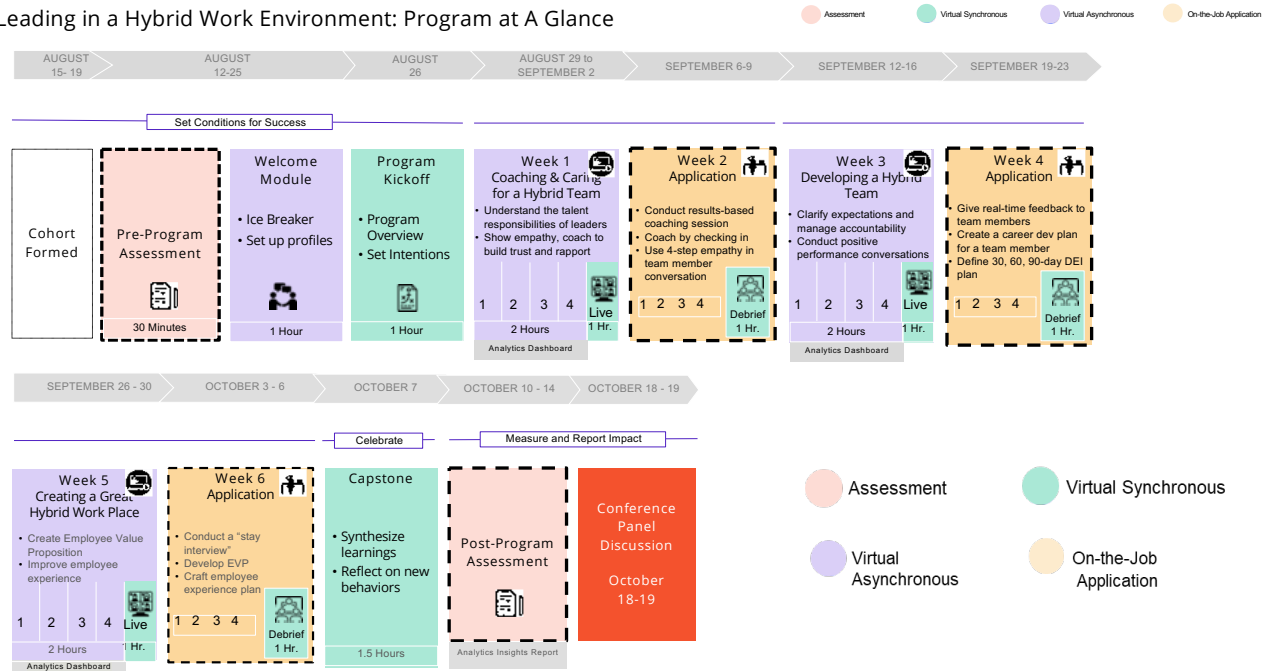
Data Collection

- Application Process (Business Alignment)
- Polling and chat each month during skill building
- Questionnaire
 - Three months into program
 - Six-month skill building completion
 - 12-month end of program
- Interviews

14

14

Leading in a Hybrid Work Environment: Program at A Glance



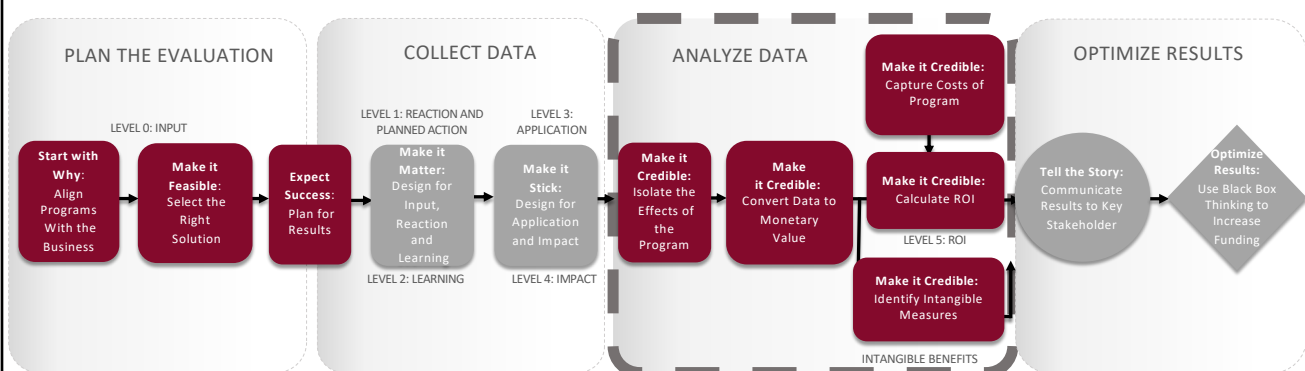
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15

15

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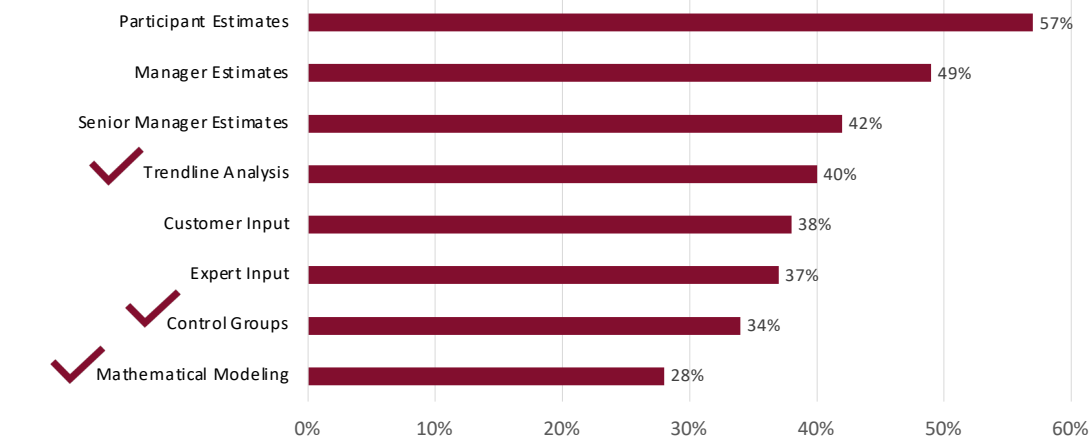


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16

16

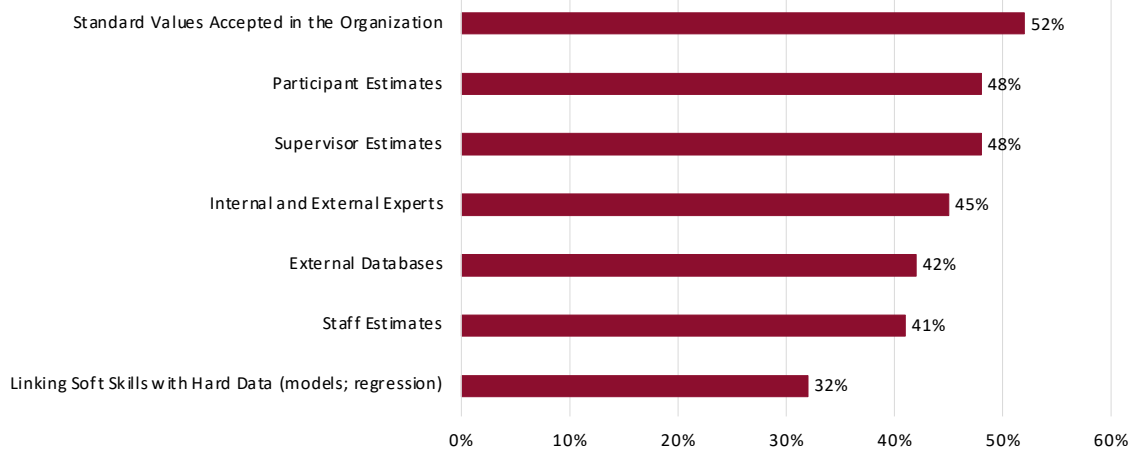


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Isolate Program Effects

17

17

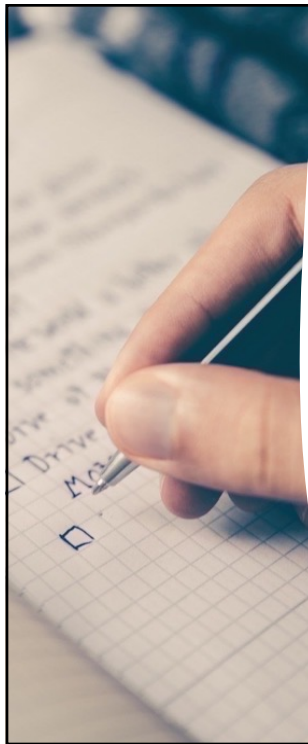


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Convert Impact Measures to Money

18

18



Account for Fully-Loaded Costs

“When in doubt, put it in.”

The process should withstand even the closest scrutiny in terms of its credibility.

DIRECT

- ☐ Program materials
- ☐ Instructor/facilitator
- ☐ Facilities
- ☐ Travel, lodging, meals

INDIRECT

- ☐ Needs assessment (Prorated)
- ☐ Program development (Prorated)
- ☐ Participant time (salaries & benefits)
- ☐ Administrative/overhead
- ☐ Evaluation

19

19

The Value of Chaplaincy

*Skills required of a chaplain:

- Excellent listening, communication and interpersonal skills in order to build and develop relationships with the people you are helping.
- An understanding and willingness to engage with people of all cultures

*from prospects.ac.uk

Business Needs

- Length of stay (LOS) of patients in high-cost units such as the intensive care unit (ICU)
- Patient satisfaction including that of the patient's family members

Results

- Cost savings to hospital in one year of \$251,640
- Ensured patient care
- Improved family care
- Secured future funding
- Cost of solution: \$33,800
- ROI: ???

Approach



Action 01

Aligned chaplaincy with the needs of the business.



Action 02

Positioned chaplaincy integration in the ICU for success by developing clear objectives



Action 03

Ensured buy-in and knowledge of process from ICU medical team, patient, and patient's family



Action 04

Collected data along the way. Compared LOS in ICU with chaplain integration to LOS in similar ICU settings without chaplain integration

Source: Doug Stewart, Chief Chaplain at Memorial Regional Health System in Belleville, Illinois. Featured in Phillips, P. P. and Phillips, J. J. (2023) Show the Value of What You Do. Oakland, CA: Berrett-Koehler Publishing.

20

20

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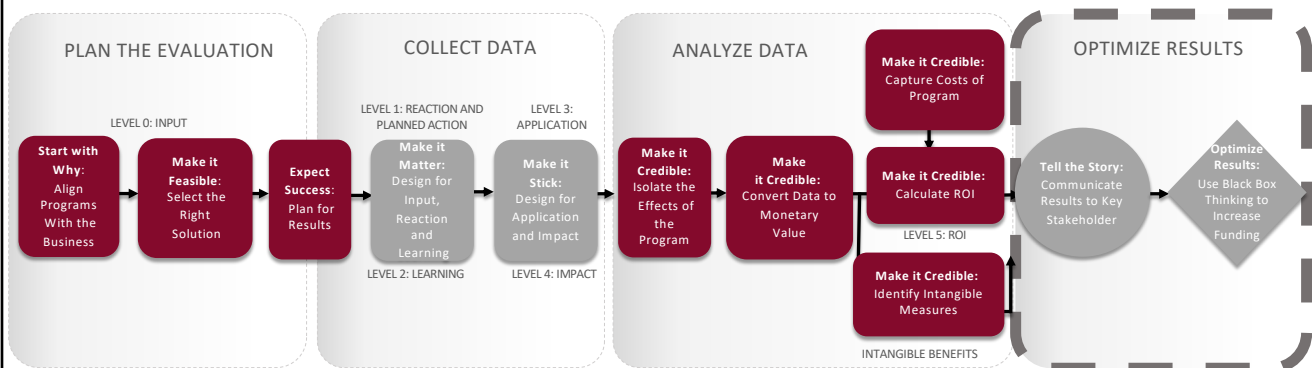
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21

21

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Designing for the Delivery of Business Results



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22

22

With more than 20 years of experience in the learning & development industry, **Kaycee Buckley is Director for Global Commerical Talent**. She works with organizational leaders to define talent development, strategies, develop and deploy learning events, and measure the business impact for these training initiatives.



*Just wanted to let you know that I presented the Coaching ROI results to my DVP and the Area Commercial Directors last Thursday. It was AMAZING! They were surprised and not surprised by the results. That is, **they were not surprised that the ROI was negative** because they are all aware that the Sales Managers are not coaching and agreed with the barriers as I had outlined in the study. **They were surprised at what a negative impact “not applying Coaching” was making to the business, which sparked a very productive conversation as to what to do to fix it.***

Wow...such positive outcomes from my stakeholders...and with a negative ROI!

Tell your story. Optimize results.

23

23

Healthcare, Inc.

Data Collection Techniques

- (L1) Questionnaire – end of program
- (L2) Knowledge Assessment; Skill Practice – during program
- (L3) Self Assessment Questionnaire – 6 months after program
- (L3) Employee Survey (25% Sample) – 6 months after program
- (L4) Complaint and Turnover Records – 12 months after program

Isolation Techniques

- Complaints – Trend Line Analysis
- Turnover – Forecasting

Data Conversion Techniques

- Complaints – Historical costs and input from experts (internal EEO/AA staff)
- Turnover – External studies within industry

Program Costs

- Fully loaded including needs assessment, development, coordination, salaries and benefits of initial meeting, and evaluation
- Total Costs: \$277,987

Benefits (Isolated)

- **Complaints**
 - Value of one complaint: \$24,343
 - Prevented over one year: 14.8
- **Turnover**
 - Value of one turnover statistic: \$20,887
 - Prevented over one year: 136

Handout page 5

24

24

What is ROI?

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25

25

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 - Prevented over one year: 14.8
 - 14.8 x \$24,343 = \$360,276.40
- **Turnover**
 - Value of one turnover statistic: \$20,887
 - Prevented over one year: 136
 - 136 x \$20,887 = \$2,840,632

$$\text{ROI} = \frac{(\text{Complaints} + \text{Turnover}) - \$277,987}{\$277,987} \times 100 =$$

26

26

Remember, when it comes to showing value:

- Hope is not a strategy.
- Luck is not a factor.
- Doing nothing is not an option.

Change is inevitable.

Progress is optional.

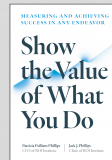


27

27

Resources

Scan the QR Code to Access Today's Session Resources



Questions?

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28

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- Complete an ROI evaluation study on an important program.
- Earn the Certified ROI Professional® (CRP) designation.
- Join the ROI Network with more than 6,000 ROI professionals.



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