

Data Items

This is normally Level 4 data items and would match the same data on the data collection plan for impact objectives and measures.

Methods for Isolating the Effects of the Program

One or more of the following methods will be used to isolate the effects of the program:

- Control Groups
- Trend Line Analysis
- Forecasting Methods
- Participants' Estimate of Impact (percent)
- Supervisor's estimate of impact (percent)
- Management's estimate of impact (percent)
- Use of experts' previous studies
- Calculate or estimate the impact of other factors
- Customer input

Converting Data to Money

One or more of the following methods will be used:

- Profit/savings from output
- Cost of quality
- Employee time as compensation
- Historical costs/savings
- Expert input
- External studies
- Linking with other measures
- Participants estimation
- Supervisor or manager estimation
- Staff estimation

Cost Categories

These costs are normally the same from one project to another but can vary depending on specific cost items. Those cost categories are:

- Cost to research, design, and develop/purchase solution components (prorate)
- Costs of materials for the solution/project
- Cost of facilitator, specialist, and/or coordinator
- Facilities costs for design and implementation staff (meetings and training)
- Travel/lodging/meals for design and implementation staff (meetings and training)
- End user/performer's salaries and benefits (attending meetings for kick-off, implementation, training)
- Administrative/overhead costs related to the project/solution
- Evaluation costs

Intangible Benefits

In this column list the potential benefits that may be linked to the program but will not be converted to money. These cannot be converted to money credibly with a reasonable amount of resources, so they will be left as intangibles. For example: Job satisfaction Teamwork Engagement Customer satisfaction Stress Reputation Image Brand

Communication Targets for the Final Report

These are the individuals and groups who will receive the information when the study is completed. They will typical be

- Donor/funder
- The key client
- Managers of participants
- Participants
- The colleagues in the functional area
- As well as many other possibilities

Other Influences

This is the place to indicate anything that might be going on at the same time that could affect the evaluation project. These are here for reminders only

Comments

This place is for any comments and notes that might be triggers, or need to have specific action etc.

ROI ANALYSIS PLAN		PURPOSE OF THIS EVALUATION:					
Program/Project:		Responsibility:		Date:			
Data Items (Usually Level 4)	Methods for Isolating the Effects of the Program/Process	Methods of Converting Data to Monetary Values	Cost Categories	Intangible Benefits	Communication Targets for Final Report	Other Influences/Issues During Application	Comments

Program/Project Objectives

In the column, list the specific objectives for each Level 1-5. Be as specific as possible using SMART objectives.

SMART objectives are

Specific
Measurable
Achievable
Realistic
Time based

Measures

This column defines the measures connected to the objectives. Reaction may be just a 1 to 5 scale. Learning may be a score on a test. Application may be a scale. Business Impact may be a definition of the impact measure with a particular target to achieve.

Methods for Data Collection

In this column one or more of the following methods may be used for each level.

- Survey
- Questionnaire
- Test
- Interviews
- Focus groups
- Observation
- Action plan
- Performance monitoring

Sources

Sources are the individuals who are providing the data. In most cases, it is the participants. In other cases, it is the manager of the participant. Still others maybe an external source, colleagues, and the actual records of the organization.

Timing

This indicates when this particular data will be collected. For Levels 1 and 2 it is usually during the program or in the early part of the program. For Levels 3 and 4, it depends on when the ideal time for application and ideal time for impact.

Responsibilities

This is the individual or individuals who will be collecting the data. For Levels 1 and 2, it is sometimes the facilitator or organizer. For Levels 3 and 4, it could be the evaluation staff or some other individual who is assigned that responsibility.

DATA COLLECTION PLAN PURPOSE OF THIS EVALUATION:

Program/Project:

Responsibility:

Date:

Level	Broad Program Objective(s)	Measures	Data Collection Method/Instruments	Data Sources	Timing	Responsibilities
1	SATISFACTION/PLANNED ACTION					
2	LEARNING					
3	APPLICATION/IMPLEMENTATION					
4	BUSINESS IMPACT					
5	ROI	Comments:				