Showing the Value of Learning

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

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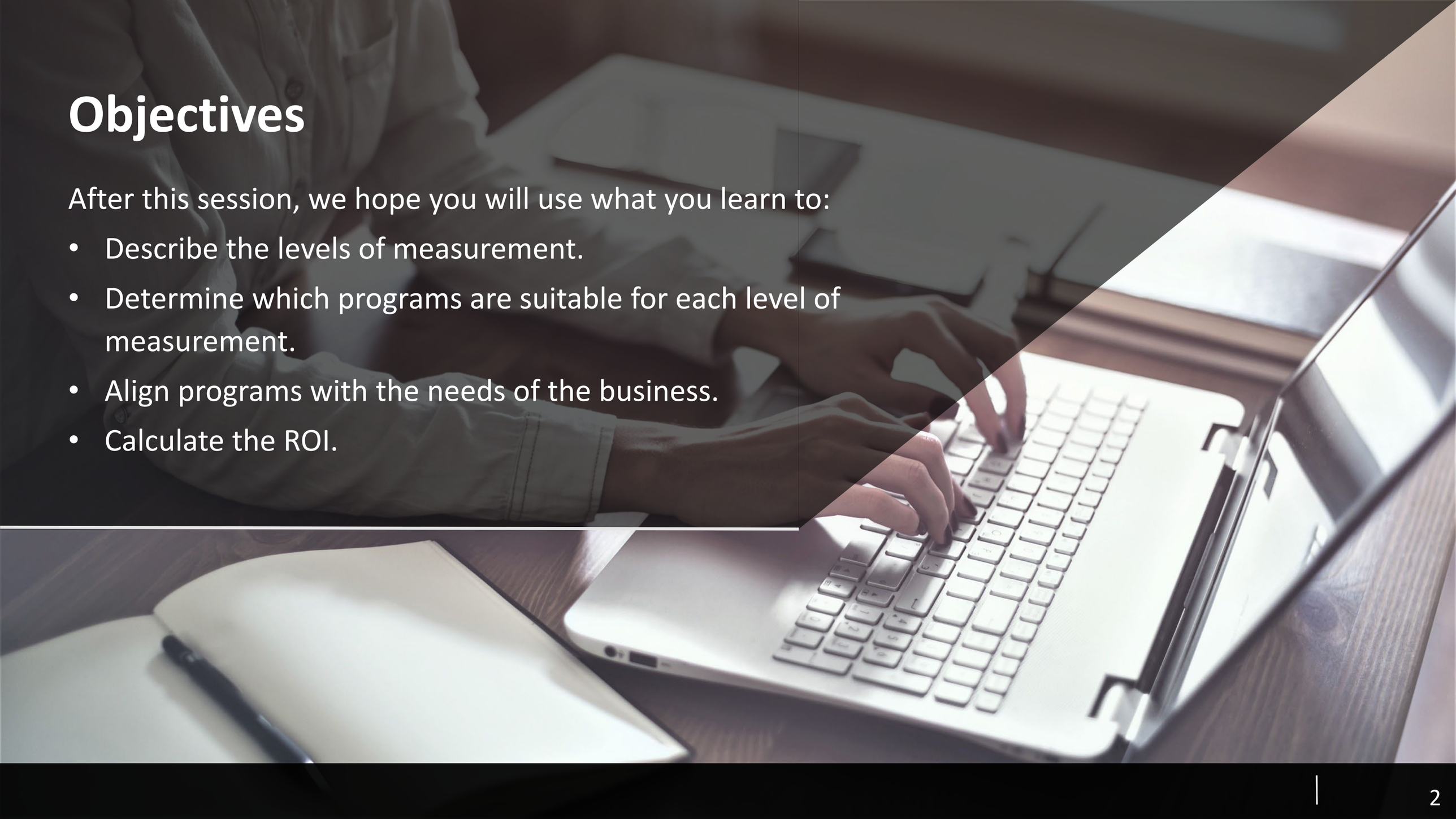
Objectives

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

- Describe the levels of measurement.
- Determine which programs are suitable for each level of measurement.
- Align programs with the needs of the business.
- Calculate the ROI.



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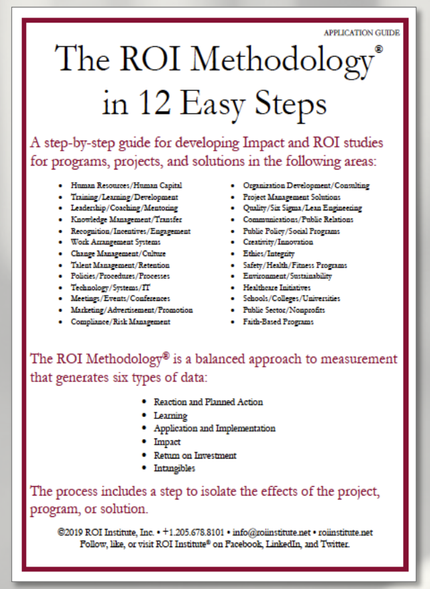

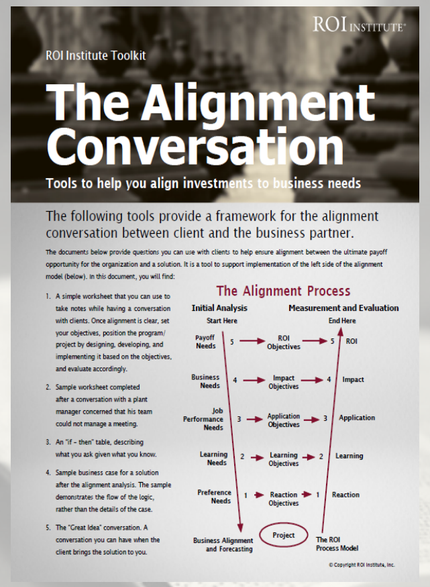

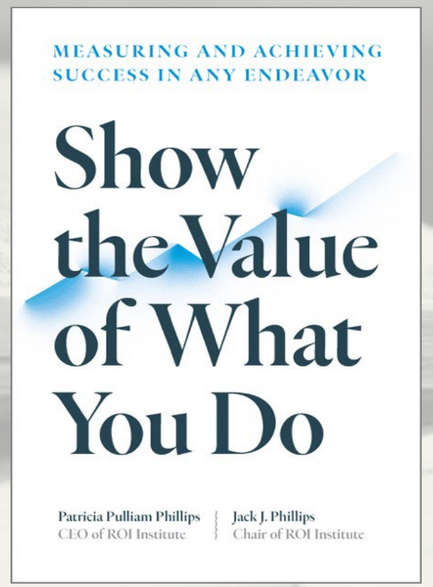

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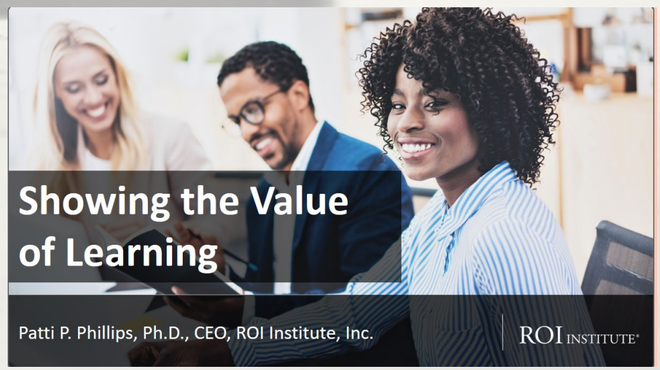

Poll: Is Your Organization A Candidate for ROI Implementation?

Score Range	Analysis of Score
A. 15-30	You are not yet a candidate for ROI.
B. 31-45	You are not a strong candidate for ROI, however, it is time to start pursuing some type of measurement process.
C. 46-60	You are a candidate for building skills to implement the ROI process. At this point there is no real pressure to show the ROI, which is the perfect opportunity to perfect the process within the organization.
D. 61-75	You should already be implementing a comprehensive measurement and evaluation process, including ROI.

Global Communications

CEO: Sydney Mitchell
GlobalCom University President: Donald Hodges

Sydney has been CEO for nine months. She has a reputation for begin aggressive about meeting goals, yet she is pragmatic and fair. She is interested in profits, productivity, customer satisfaction, and positioning the company as being a Great Place to Work.

In a recent meeting with Donald, she asked him a simple question:

What value are we gaining from our investment in GlobalCom University?

Activity versus Results

Activity-Based	Results-Based
• No business need for the program • No assessment of performance issues • No specific measurable objectives • No effort to prepare program participants to achieve results • No effort to prepare the work environment to support program • No efforts to build partnerships with key managers • No measurement of results or cost-benefit analysis • Reporting on programs is input focused	• Program linked to specific business needs • Assessment of performance effectiveness • Specific objectives for application and business impact • Results expectations communicated to participants • Environment prepared to support program • Partnerships established with key managers and clients • Measurement of results or cost-benefit analysis (ROI) • Reporting on programs is outcome-focused

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Poll: How Results-Based are Your Programs?

Score Range	Analysis of Score
A. 120–150	**Outstanding Environment** for achieving results with training and development. Great management support. A truly successful example of results-based training and development.
B. 90–119	**Above Average** in achieving results with training and development. Good management support. A solid and methodical approach to results-based training and development.
C. 60–89	**Needs Improvement** to achieve desired results with training and development. Management support is ineffective. Training and development programs do not usually focus on results.
D. 30–59	**Serious Problems** with the success and status of training and development. Management support is non-existent. Training and development programs are not producing or showing the value of the program.

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
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.

ROI Defined

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

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

ROI Defined

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

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

Five-Level Evaluation Framework

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Measurement Targets

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%

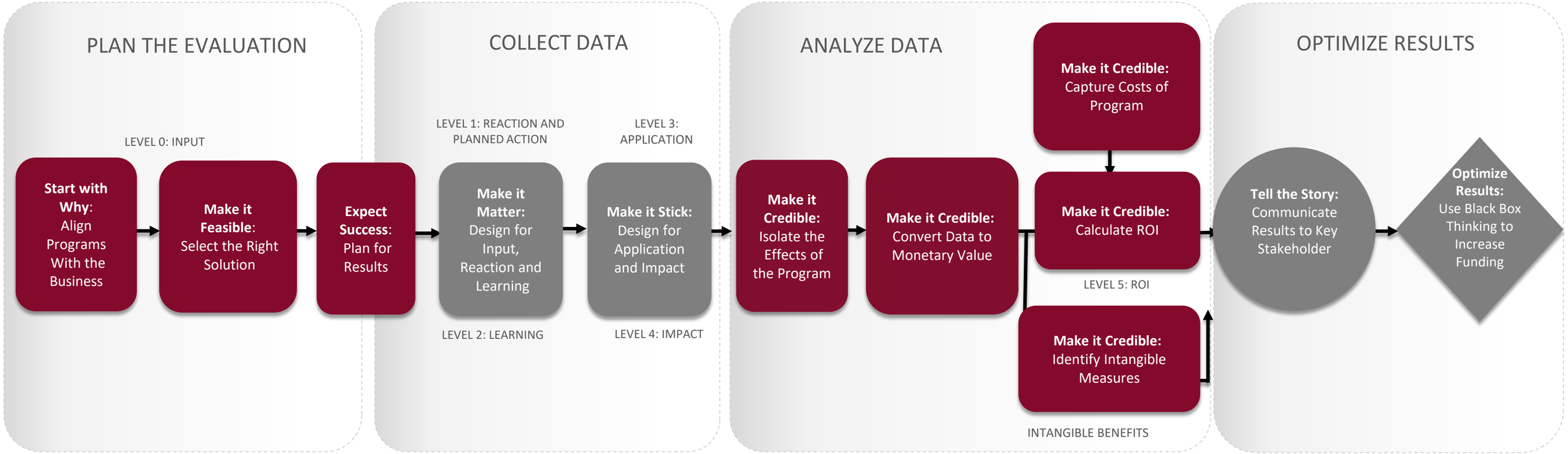
*Percentage of programs evaluated at each level each year

**Benchmarking 2020

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



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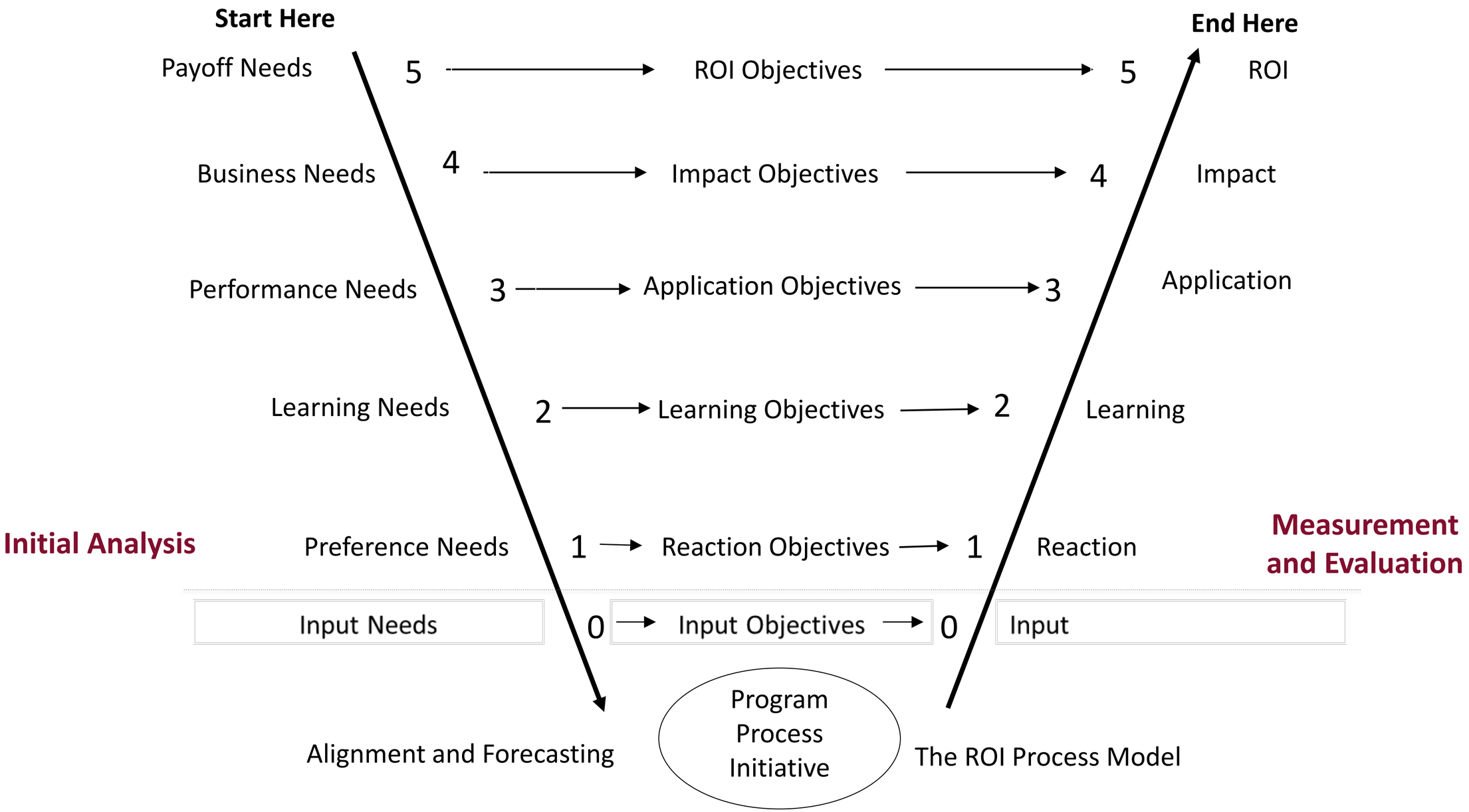
Alignment Model



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.

Learn more at: https://www.renewamericatogether.org/cli/

Program Design

12-month open-enrollment 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

Leading in a Hybrid Work Environment: Program at A Glance

Assessment | Virtual Synchronous | Virtual Asynchronous | On-the-Job Application

AUGUST 15- 19 > AUGUST 12-25 > AUGUST 26 > AUGUST 29 to SEPTEMBER 2 > SEPTEMBER 6-9 > SEPTEMBER 12-16 > SEPTEMBER 19-23

Set Conditions for Success

Cohort Formed

Pre-Program Assessment
30 Minutes

Welcome Module
- Ice Breaker
- Set up profiles

1 Hour

Program Kickoff
- Program Overview
- Set Intentions

1 Hour

Week 1 Coaching & Caring for a Hybrid Team
- Understand the talent responsibilities of leaders
- Show empathy, coach to build trust and rapport

1 2 3 4 Live 1 Hr.
2 Hours
Analytics Dashboard

Week 2 Application
- Conduct results-based coaching session
- Coach by checking in
- Use 4-step empathy in team member conversation

1 2 3 4 Debrief 1 Hr.

Week 3 Developing a Hybrid Team
- Clarify expectations and manage accountability
- Conduct positive performance conversations

1 2 3 4 Live 1 Hr.
2 Hours
Analytics Dashboard

Week 4 Application
- Give real-time feedback to team members
- Create a career dev plan for a team member
- Define 30, 60, 90-day DEI plan

1 2 3 4 Debrief 1 Hr.

SEPTEMBER 26 - 30 > OCTOBER 3 - 6 > OCTOBER 7 > OCTOBER 10 - 14 > OCTOBER 18 - 19

Celebrate

Measure and Report Impact

Week 5 Creating a Great Hybrid Work Place
- Create Employee Value Proposition
- Improve employee experience

1 2 3 4 Live 1 Hr.
2 Hours
Analytics Dashboard

Week 6 Application
- Conduct a "stay interview"
- Develop EVP
- Craft employee experience plan

1 2 3 4 Debrief 1 Hr.

Capstone
- Synthesize learnings
- Reflect on new behaviors

1.5 Hours

Post-Program Assessment
Analytics Insights Report

Conference Panel Discussion
October 18-19

Assessment
Virtual Synchronous
Virtual Asynchronous
On-the-Job Application

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Download the report: https://roiinstitute.net/report/

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

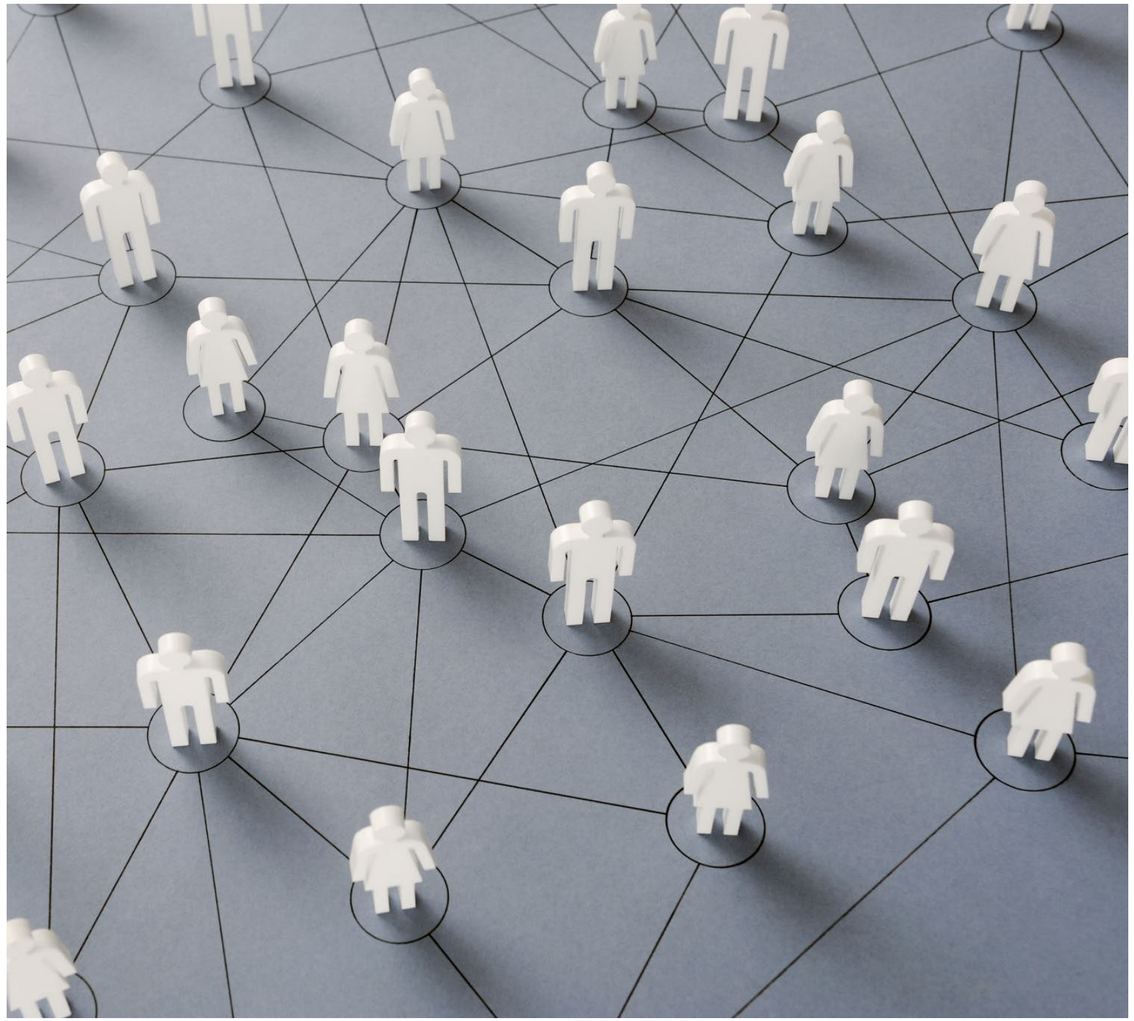
Action 04

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.

Tell the Story

- Measurement and evaluation are meaningless without communication.
- Communication is necessary for making improvements.
- Communication is a sensitive issue.
- Different audiences need different information.



Healthcare, Inc.

Data Collection Techniques

- (L1) Questionnaire – end of program
- (L2) Knowledge Assessment; Sill 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

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.

If you want to show the value of what you do, keep in mind:

- **Activity represents costs, costs get cut.**
  Clarify why the work you do matters by focusing on results.

- **Specificity drives results.**
  Define success in specific, measurable terms that align with the needs and interests of all stakeholders.

- **Inexpensive solutions can lead to high ROIs. Negative ROIs can lead to positive outcomes.**
  Tell your story, use the results.

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.

Poll: What issues are of most interest to you?

A. Collecting data
B. Isolating program effects
C. Converting measures to monetary benefits
D. Communicating data/results
E. Leveraging insights
F. Mistakes with learning measurement/analytics and how to overcome them
G. Other…(add response to chat)

Resources

Scan the QR Code to Access Today's Session Resources

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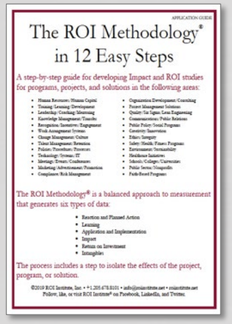

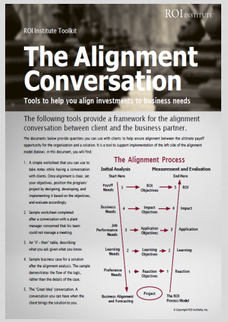

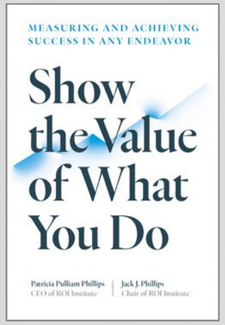

Questions?

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By attending ROI Certification, you will:

- Build serious measurement and evaluation capability.
- Maximize learning through weekly group coaching with ROI Institute leaders.
- Complete an ROI evaluation study on an important program.
- Earn the Certified ROI Professional® (CRP) designation and digital badge.
- Join the ROI Network with more than 6,000 ROI professionals.
- Advance your professional skills and improve organization outcomes.

SCAN ME

https://roiinstitute.net/roicertification/

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Patti P. Phillips, Ph.D.

- Author, Educator, Consultant, Coach
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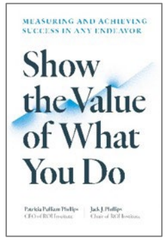
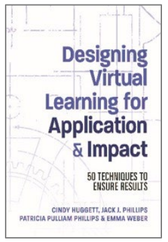
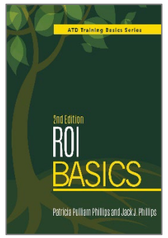
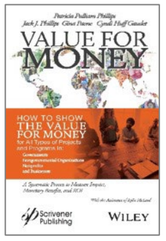
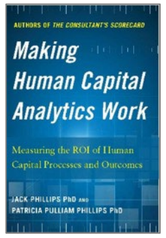
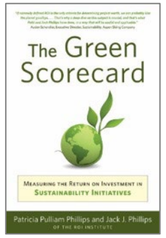
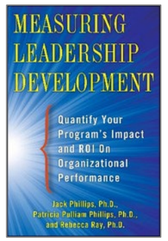
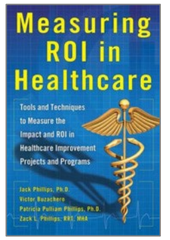
- Chair, i4cp People Analytics Board
- Member, International Federation of Training and Development Board
- Vice Chair, UN Institute for Training and Research Board of Trustees
- Chair, Center for Talent Reporting Board
- Fellow, ATD Certified Professional in Talent Development

Author of these books and more.