Measuring ROI in the Public Sector

Agenda

After attending this session, you will be able to:

- Identify the steps, elements, and standards involved in the ROI methodology
- Select particular programs for appropriate levels of analysis
- Explain the benefits of the use of ROI methodology
- Describe how ROI has been applied in Public Sector organizations

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The “New” Definition of Value

Value Must:

- Be balanced, with qualitative and quantitative data
- Contain financial and non-financial perspectives
- Reflect strategic and tactical issues
- Represent different time frames
- Satisfy all key stakeholders
- Be consistent in collection and analysis
- Be grounded in conservative standards
- Come from credible sources
- Reflect efficiency in its development
- Create a call for action

What is your definition of value?

The “Show Me” Evolution

Term	**Issue**
Show Me!	Collect Impact Data
Show Me the **Money!**	And Convert Data to Money
Show Me the **Real** Money!	And Isolate the Effects of the Project
Show Me the **Real Money, And Make me Believe it!**	And Compare the Money to the Cost of the Project

Is it possible to “show the money” in the Public Sector?

Could you “show the money”?

Project or Program Value Chain

Level	Measurement Focus
0. Input	Measures input such as volume and efficiencies
1. Reaction & Planned Action	Measures participant reaction to the program and captures planned actions
2. Learning & Confidence	Measures changes in knowledge, skills, and attitudes
3. Application & Implementation	Measures changes in on-the-job behavior or actions and progress with actions
4. Business Impact	Captures changes in business impact measures
5. ROI	Compares program benefits to program costs

Evaluating learning is more than telling a story.

Global Trends in Measurement and Evaluation*

- Organizations are moving up the value chain in their evaluation strategies
- Investment is increasing to 3-5% of the budget
- Increased focus is driven by clients and sponsors
- ROI is the fastest growing metric
- Evaluation data is used to drive improvement and secure funding
- Evaluation is addressed early and often in the implementation cycle
- Processes are systematic and methodical, often designed into the delivery and implementation processes
- Technology is significantly enhancing processing

*Based on benchmarking with over 200+ organizations using a comprehensive measurement and evaluation process.

Evaluation Targets

	Percent of Programs			
Level	**Current**	**Target**	**Suggested**	**Benchmarking***
1 Input			100%	100%
2 Reaction			90 – 100%	79%
3 Learning			40 – 60%	54%
4 Application (Behavior)			30 %	31%
5 Impact			10 – 20%	14.4%
6 Return on Investment			5 – 10%	4.3%

*2007 Survey of Users, N = 235

When Selecting Programs for Level 4 and Level 5 Evaluation, Consider the Following

	Benchmarking*
• Life cycle of the program	14%
• Linkage of program to operational goals and issues	29%
• Importance of program to strategic objectives	50%
• Executive interest in the evaluation	48%
• Cost of the program	52%
• Visibility of the program	45%
• Size of target audience	6%
• Investment of time required	7%

Top 3 Criteria
*2007 Survey of Users, N = 235

Five Levels of Measurement - Examples

Level 0 Input and Indicators
- Number of projects
- Audiences
- Web site hits
- Request
- Attendance
- Costs
- Time to Deliver

Level 1 Reaction and Planned Action
- Relevance
- Importance
- Usefulness
- Appeal
- Emotion
- Brevity
- Uniqueness
- Concreteness
- New Information
- Motivation
- Appropriateness
- Intent to Use

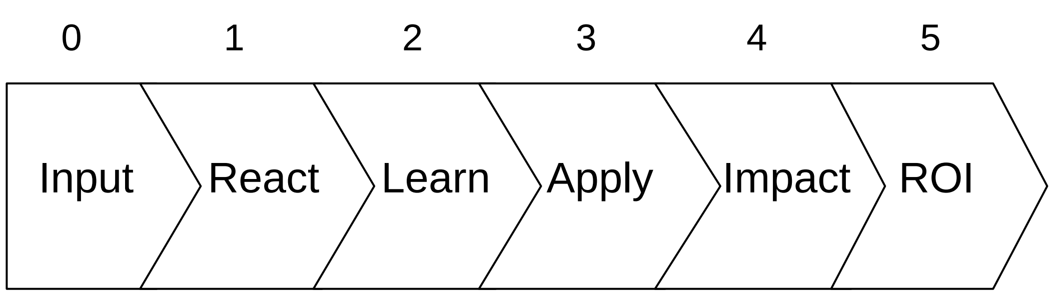
Level 2 Learning and Confidence
- Information
- Knowledge
- Understanding
- Capability
- Contacts
- Confidence
- Perceptions
- Skills

Level 3 Application and Implementation
- Use of Information
- Use of Knowledge
- Use of Skill
- Completion of Actions
- Completion of Tasks
- Implementation of Ideas
- Following the Policy
- Use of Procedure
- Use of Regulation
- Success with Application
- Barriers
- Enablers

Level 4 Business Impact
- Productivity
- Quality
- Incidents
- Efficiency
- Compliance Discrepancies
- Costs
- Employee Engagement
- Employee Retention
- Customer Service
- Customer Satisfaction

Intangible Measures
…. includes a technique to isolate the effects of the communication project.

Level 5 Return on Investment
- ROI (%)
- Benefit Cost Ratio
- Payback Period



Shifting Paradigms

Activity Based →	**Results Based**
• No business need for the program	• Program linked to specific business
• No assessment of performance issues	• Assessment of performance effectiveness
• No specific measurable objectives	• Specific objectives for application and business impact
• No effort to prepare program participants to achieve results	• Results expectations communicated to participants
• No effort to prepare the work environment to support application	• Environment prepared to support application
• No efforts to build partnerships with key managers	• Partnerships established with key managers and clients
• No measurement of results or ROI analysis	• Measurement of results and ROI analysis
• Planning and reporting are input focused	• Planning and reporting are outcome focused

The ROI Process Collects Six Types of Results

1. Reaction and Planned Action
2. Learning and Confidence
3. Application and Implementation
4. Business Impact
5. Return on Investment
6. Intangible Benefits

. . . and includes a technique to isolate the effects of the program or solution.

The use of the ROI Process is Impressive:

- Process refined over a 25-year period
- Thousands of impact studies conducted each year
- More than 200 case studies published on ROI use
- More than 20,000 have attended a two day ROI workshop
- More than 4,000 individuals attended the ROI certification workshop
- More than 20 books developed to support the process
- ROI Process adopted by hundreds of organizations in manufacturing, service, non-profit, and government settings in 44 countries

The Benefits of ROI

Reactive

- Show contributions of selected programs
- Justify/defend budgets
- Identify inefficient programs that need to be redesigned or eliminated

Proactive

- Aligns learning to business needs
- Earn respect of senior management / administrators
- Improve support for projects
- Enhance design and implementation processes
- Identify successful programs that can be implemented in other areas
- Earn a “seat at the table”

Are You Ready for a Comprehensive Measurement and Evaluation System?

Check the most appropriate level of agreement for each statement:
1 = Strongly Disagree; 5 = Strongly Agree

	Statement	Disagree 1	2	3	4	Agree 5
1.	My organization is considered a large organization with a wide variety of programs.	☐	☐	☐	☐	☐
2.	We have a large budget that attracts the interest of senior management.	☐	☐	☐	☐	☐
3.	Our organization has a culture of measurement and is focused on establishing a variety of measures in all functions and departments.	☐	☐	☐	☐	☐
4.	My organization is undergoing significant change.	☐	☐	☐	☐	☐
5.	There is pressure from senior management to measure results of our programs.	☐	☐	☐	☐	☐
6.	My function currently has a very low investment in measurement and evaluation.	☐	☐	☐	☐	☐
7.	My organization has experienced more than one program disaster in the past.	☐	☐	☐	☐	☐
8.	My department has a new leader.	☐	☐	☐	☐	☐
9.	My team would like to be the leaders in our field.	☐	☐	☐	☐	☐
10.	The image of our department is less than satisfactory.	☐	☐	☐	☐	☐
11.	My clients are demanding that our processes show bottom-line results.	☐	☐	☐	☐	☐
12.	My function competes with other functions with our organization for resources.	☐	☐	☐	☐	☐
13.	There is increased focus on linking our process to the strategic direction of the organization.	☐	☐	☐	☐	☐
14.	My function is a key player in change initiatives currently taking place in the organization.	☐	☐	☐	☐	☐
15.	Our overall budget is growing and we are required to prove the bottom line of value of our processes.	☐	☐	☐	☐	☐

Scoring

If you scored:

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

Are you a candidate? __________________________

Who is Using the Methodology?

- Accenture
- Apple Computer
- AT&T
- Bank of America
- Banner Healthcare
- Baptist Medical Center
- Boston Scientific
- Bristol-Myers Squibb
- Children's Hospital of Los Angeles
- Cigna Insurance
- Covenant Healthcare Systems
- CVS/Caremark
- Dell Computers
- Deloitte & Touche
- Delta Airlines
- DHL Worldwide Express
- Eli Lilly
- Federal Express
- Fidelity Investments
- Genentech
- GlaxoSmithKline
- Hewlett-Packard
- KPMG
- Intel
- Lockheed Martin
- Memorial Foundation Hospital
- Menlo Logistics
- Merck
- Microsoft
- Motorola
- NCR
- Nike
- PricewaterhouseCoopers
- QUALCOMM
- Saudia Aramco
- Scripps Health
- Shell Oil
- UPS
- Wachovia Bank
- Wal-Mart

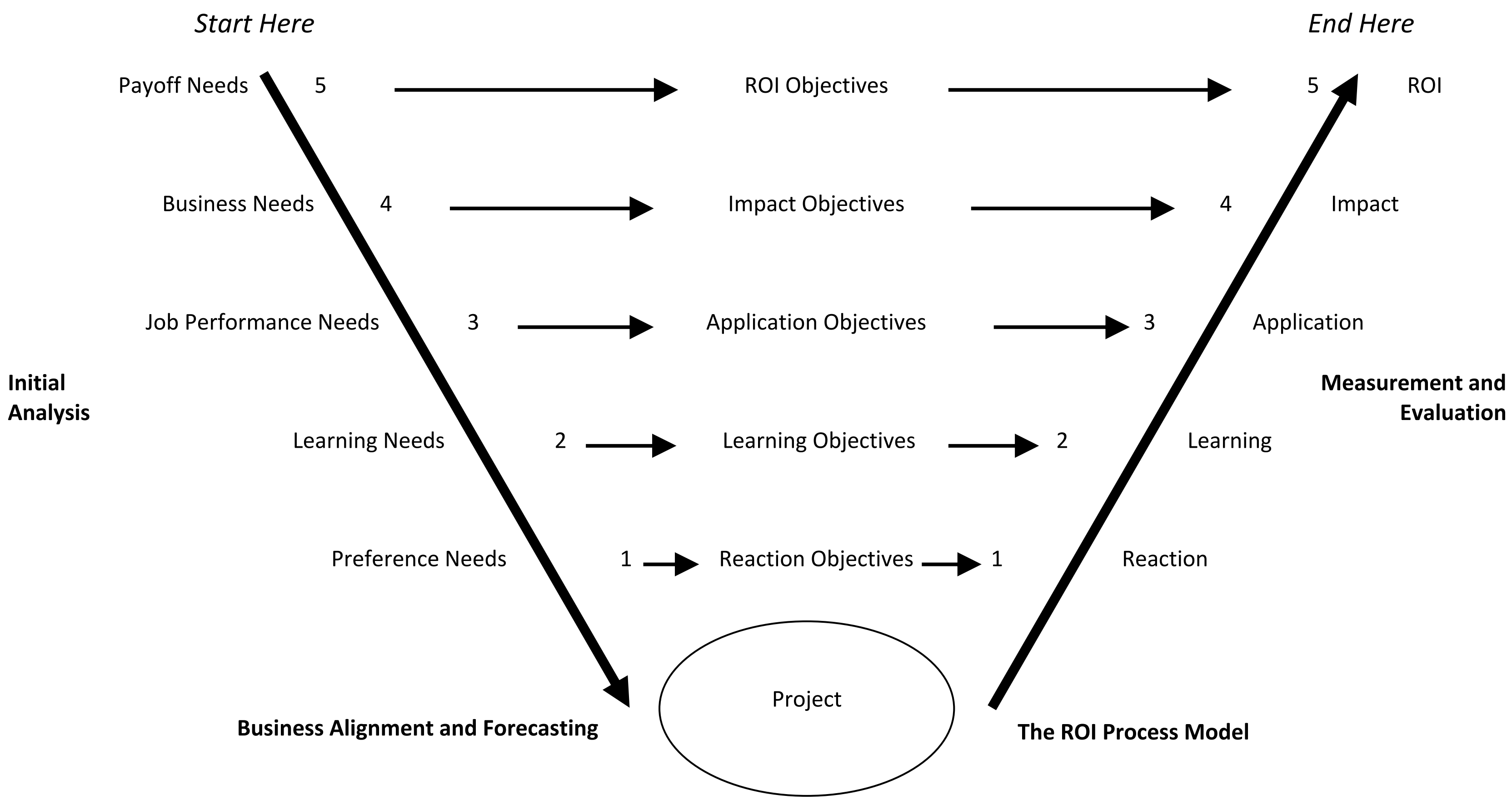
Over 2,000 private sector organizations

Who is Using the Methodology?

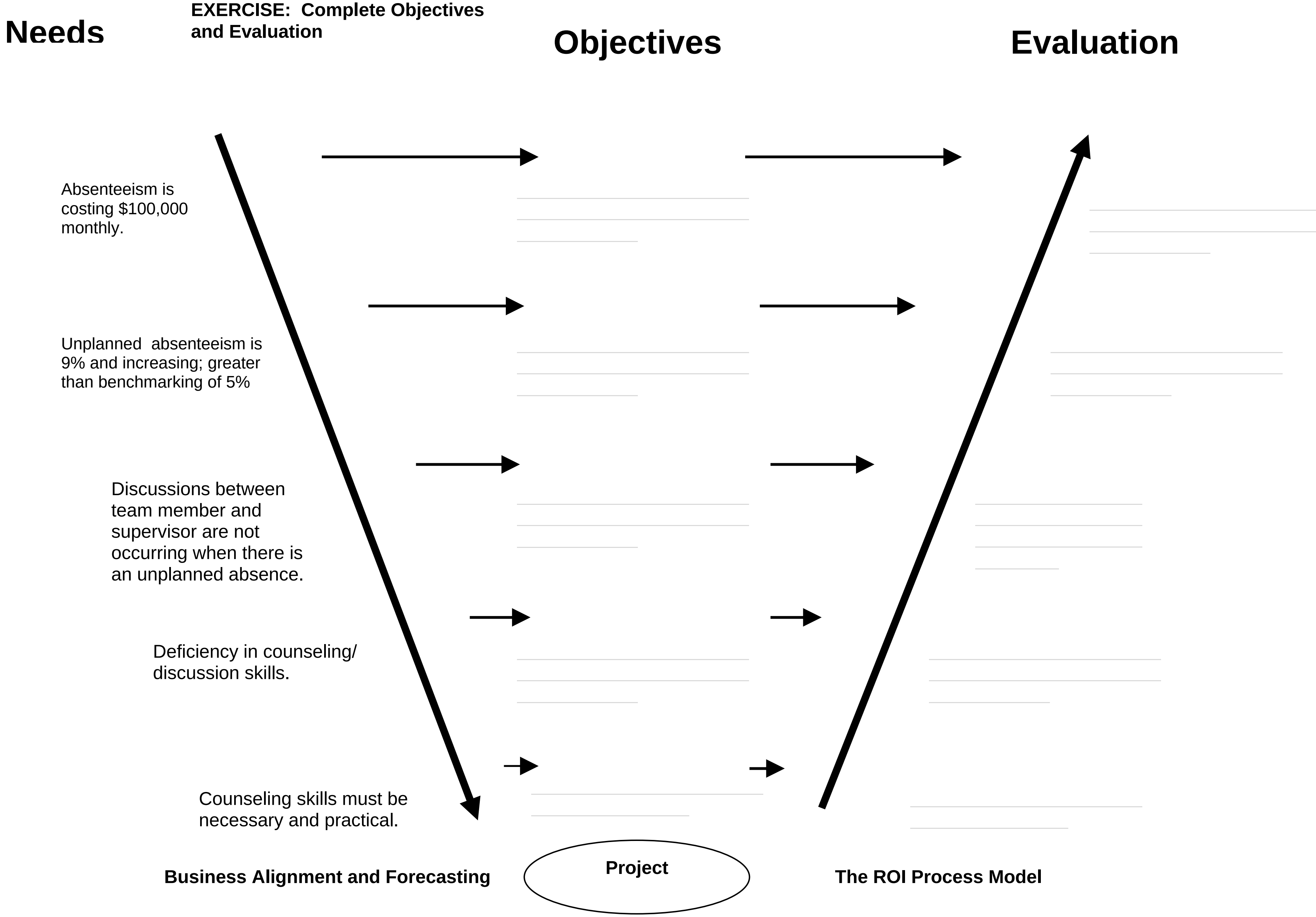
- US Department of Defense
- US Department of Navy
- US Department of Labor
- US Department of National Security Agency
- Central Intelligence Agency
- US Office of Personnel Management
- NASA
- State of Texas
- State of New York
- Government of New Zealand
- Government of Singapore
- Government of Poland
- Government of Australia
- Government of Canada

Over 200 public sector organizations

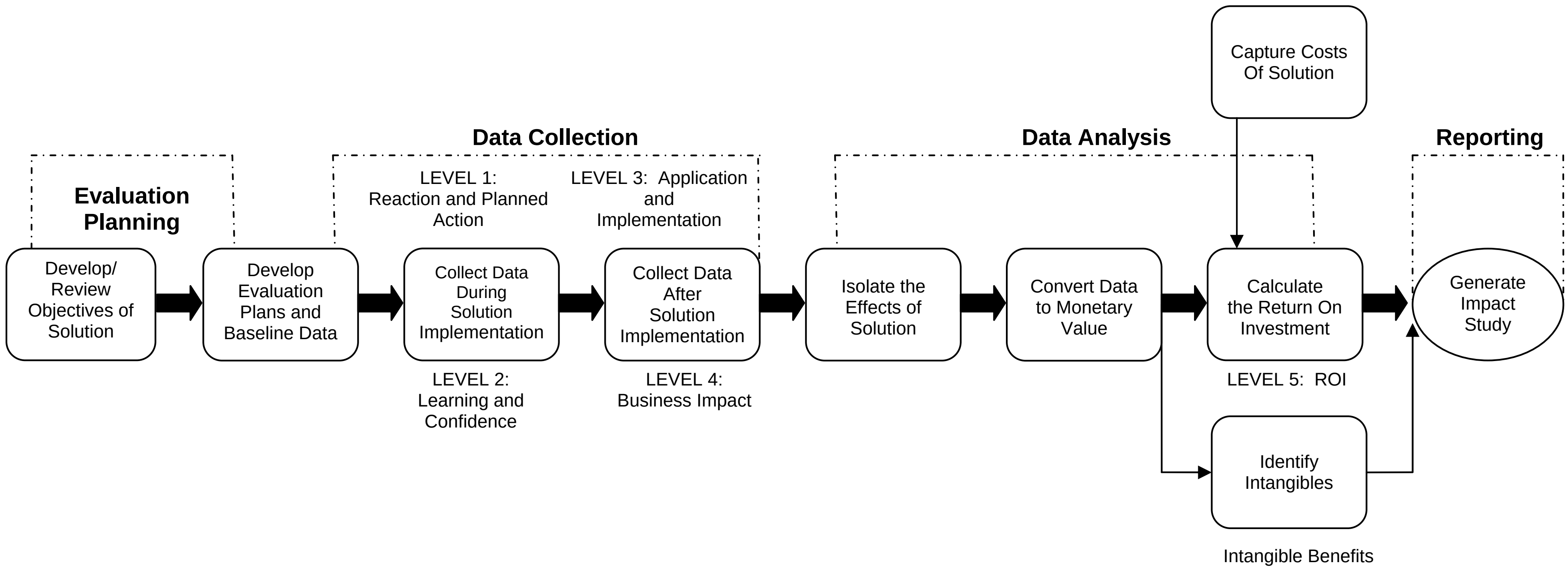
The Alignment Process



EXERCISE: Complete Objectives and Evaluation



The ROI Methodology



ROI Calculation

$$\text{ROI} = \frac{\text{Net Project Benefits}}{\text{Project Costs}}$$

Cost of project $230,000
Benefits of project (1st year) $430,000

$$\text{ROI} = \frac{\$430{,}000-\$230{,}000}{\$230{,}000} = 087 \times 100 = 87\%$$

Evaluation Framework

Level	*Measurement Focus*
1. Reaction & Planned Action	Measure participant satisfaction with the project/project and captures planned action.
2. Learning & Confidence	Measures changes in knowledge, skills, and attitude.
3. Application & Implementation	Measures implementation and changes in behavior in the performance setting.
4. Business Impact	Measures changes in business impact variables.
5. Return on Investment	Compares benefits to the costs.

12 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 alternatives for calculations.
5. Use at least one method to isolate the effects of the program or 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 improvements for the potential error of the estimates.
8. Avoid use of extreme data items and unsupported claims when calculating ROI calculations.
9. Use only the first year of annual benefits in the ROI analysis of short-term solutions.
10. Fully load all costs of the 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 the ROI Methodology to all key stakeholders.

The ROI Process

A comprehensive measurement and evaluation process that generates six types of measures:

- Reaction and Planned Action
- Learning and Confidence
- Application and Implementation
- Business Impact
- Return on Investment
- Intangible Measures

This balanced approach to measurement includes a technique to isolate the effect of the program or solution.

Results-based Solutions

- Performance solutions/projects are initiated, developed and delivered with the end in mind.
- Participants understand their responsibility to obtain results with programs/solutions.
- Support groups (management, supervisors, co-workers, etc.) help to achieve results from performance solutions.
- A comprehensive measurement and evaluation system is in place for each program/project.
- Variety of approaches utilized to measure contribution, representing a balanced viewpoint.
- Follow-up evaluations (Application, Impact, and ROI) are developed for targeted solutions/projects and results are reported to a variety of stakeholders.

Collecting Follow-UP Data

Method	Type of Data: Level 3	Level 4
Surveys/Questionnaires	✓	✓
Observation on the Job	✓	
Interviews	✓	
Follow-Up Focus Group	✓	
Action Planning	✓	✓
Performance Contracting	✓	✓
Performance Monitoring		✓

Isolation Techniques Used in Studies

1. Control Groups
2. Trend Line Analysis
3. Forecasting Methods
4. Participant Estimates
5. Manager Estimates
6. Sr. Management Estimates
7. Expert Input
8. Customer Input

*2007 Survey of Users, N = 235

Converting Data to Money

	Credibility	Resources Needed
Standard values	High	Low
Records / Reports analysis	High	High
Databases	Moderate	Moderate
Expert estimation	Moderate	Low

Tabulating Program Costs

<u>Direct</u>

- Program Materials
- Facilitator Costs
- Facilities
- Travel

<u>Indirect</u>

- Needs Assessment
- Program Development
- Participant Time
- Administrative Overhead
- Evaluation

Potential Intangible Benefits

Adaptability
Awards
Brand awareness
Career minded
Caring
Collaboration
Communication
Conflicts
Cooperation
Corporate social responsibility
Creativity
Culture
Customer complaints
Customer response time
Customer satisfaction
Decisiveness
Employee complaints
Engagement
Execution
Image
Innovation
Job satisfaction
Leadership
Networking
Organizational climate
Organizational commitment
Partnering
Reputation
Resilience
Stress
Talent
Teamwork

Defining the Return on Investment

The ROI is calculated the same as the financial ROI for a building.

$$\text{Benefits-Cost Ratio} = \frac{\text{Monetary Benefits}}{\text{Program Costs}}$$

$$\text{ROI (\%)} = \frac{\text{Net Monetary Benefits}}{\text{Program Costs}} \text{ X } 100$$

Example

Costs for project (25 participants)	$80,000
Benefits from program (1st year)	$240,000

BCR = ____________

ROI = _______________ x 100 = ______%

A great ROI? Depends on the objective.

____

____

____

____

____

____

ROI Objective Options

1. Set the value at the same level as other investments – 15%
2. Set slightly above other investments – 25%
3. Set at breakeven – 0%
4. Set at client expectations

Private sector organizations usually go with option #2; public sector organizations prefer #3.

ROI Best Practices

1. The ROI methodology is implemented as a process improvement tool and not a performance evaluation tool for the staff.
2. ROI impact studies are conducted very selectively, usually involving 5-10% of projects and programs.
3. A variety of data collection methods are used in ROI analysis.
4. For a specific ROI evaluation, the effects of the program are isolated from other influences.
5. Business impact data are converted to monetary values.
6. ROI evaluation targets are developed, showing the percent of programs evaluated at each level.
7. The ROI methodology generates a micro level scorecard.
8. ROI methodology data are being integrated to create a macro scorecard for the learning/ development function
9. The ROI methodology is being implemented for about 3-5% of the budget.
10. ROI forecasting is being implemented routinely.
11. The ROI methodology is used as a tool to strengthen/improve the programs and processes.

*Based on benchmarking with over 200 organizations using ROI routinely

Cost-Saving Approaches to ROI

- Plan for evaluation early in the process
- Build evaluation into the process
- Share the responsibilities for evaluation
- Require participants to conduct major steps
- Use short-cut methods for major steps
- Use sampling to select the most appropriate programs for ROI analysis
- Use estimates in the collection and analysis of data
- Develop internal capability to implement the ROI process
- Streamline the reporting process
- Utilize web-based software to reduce time

Status of ROI Use*

Is your leadership and/or clients a [redacted]

1. Yes
2. No

Does your company have a measure[redacted]

1. Yes
2. No and no plans for it in the near future
3. No, but is it in process of being developed

Does your company have a measure[redacted]

1. Yes
2. No and no plans for it in the near future
3. No, but being developed

How many ROI studies has your com[redacted]

1. 1
2. 2 – 3
3. 4 – 8
4. 9 – 15
5. 16 or more

*2007 Survey of Users, N = 235

What happens if we maintain a status Quo?

- Budget?
- Support?
- Influence?
- Other Issues?

ROI Reality

- Impact/ROI information is desired by clients/ executives
- The impact/ROI process provides a balanced, credible approach with six types of data
- All types of organizations are routinely using impact/ROI
- The impact/ROI process can be implemented without draining resources
- The impact/ROI process is a long-term goal for many organizations.

ROI Quiz

True or False? Please choose the answer you feel is most correct

	T	F
1. The ROI Methodology generates just one data item, expressed as a percentage.	☐	☐
2. A program with monetary benefits of $200,000 and costs of $100,000 translates into a 200% ROI.	☐	☐
3. The ROI Methodology is a tool to improve process and projects, learning/development process.	☐	☐
4. After reviewing a detailed ROI impact study, senior executives will usually require ROI studies on all programs.	☐	☐
5. ROI studies should be conducted very selectively, usually involving 5-10% of programs.	☐	☐
6. While it may be a rough estimate, it is always possible to isolate the effects of a program on impact data	☐	☐
7. A program costing $100 per participant, designed to teach basic skills with job related software, is an ideal program for an ROI impact study.	☐	☐
8. Data can always be converted to monetary value, credibly.	☐	☐
9. The ROI Methodology contains too many complicated formulas.	☐	☐
10. The ROI Methodology can be implemented for about 3-5% of my budget.	☐	☐
11. ROI is not future oriented; it only reflects past performance.	☐	☐
12. ROI is not possible for soft skills programs.	☐	☐
13. If an ROI impact study, conducted on an existing program, shows a negative ROI, the client is usually already aware of the program's weaknesses.	☐	☐
14. The best time to consider an ROI evaluation is three months after the program is completed.	☐	☐
15. In the early stages of implementation, the ROI Methodology is a process improvement tool and not performance evaluation for the team.	☐	☐
16. If senior executives are not asking for ROI, there is no need to pursue the ROI Methodology.	☐	☐

So, how did you do?

Now that the answers to the quiz have been explained, see how you fared. Tally your scores. Based on the interpretations below, what is your ROI acumen?

No. of Correct Responses	Interpretation
14-16	You could be an ROI consultant
10-13	You could be a speaker at the next ROI Conference
7-9	You need a copy of a thick ROI book
4-6	You need to attend a two-day ROI workshop
1-3	You need to attend the ROI certification

Sample of Published ROI Studies

Case Study Name	Measuring the ROI:	Key Impact Measures:	ROI
Cracker Box	Performance Management (Restaurant Chain)	A variety of measures, such as productivity, quality, time, costs, turnover, and absenteeism	298%[1]
Federal Information Agency	Internal Graduate Degree Program (Federal Agency)	Retention, individual graduate projects	153%[4]
Healthcare	Sexual Harassment Prevention (Health Care Chain)	Complaints, turnover, absenteeism, job satisfaction	1052%[2]
Imperial National Bank	Executive Leadership Development (Financial)	Team projects, individual projects, retention	62%[2]
International Car Rental	First Level Leadership Development (Auto Rental Company)	Various measures – at least two per manager	105%[7]
MetroTransit	Absenteeism Control/Reduction Program (Major City)	Absenteeism, customer satisfaction	882%[2]
Midwest Electric	Stress Management Program (Electric Utility)	Medical costs, turnover, absenteeism	320%[2]
National Crushed Stone	Skill-Based Pay (Construction Materials Firm)	Labor costs, turnover, absenteeism	805%[2]
National Steel	Safety Incentive Plan (Steel Company)	Accident frequency rate, accident severity rates	379%[2]
Nations Hotel	Executive Coaching (Hotel Chain)	Cost reduction, sales growth, operating efficiency, retention, and customer satisfaction	221%[5]
Nextel Communications	Diversity (Communications Company)	Retention, employee satisfaction	163%[6]
Southeast Corridor Bank	Retention Improvement (Financial Services)	Turnover, staffing levels, employee satisfaction	258%[3]
United Petroleum	E-Learning (Petroleum)	Sales	206%[2]
VA Sunshine Healthcare Network	Competency Development (Veteran's Health Administration)	Time savings, work quality, faster response	159%[4]

References for Published Studies

1. *In Action: Measuring Return on Investment*, Volume 3. Patricia P. Phillips, Editor; Jack J. Phillips, Series Editor. American Society for Training and Development, Alexandria, VA, 2001.
2. *The Human Resources Scorecard: Measuring the Return on Investment*. Jack Phillips, Ron D. Stone, Patricia P. Phillips. Butterworth-Heinemann, Woburn, MA, 2001.
3. *In Action: Retaining Your Best Employees*. Patricia P. Phillips, Editor; Jack J. Phillips, Series Editor. American Society for Training and Development and the Society for Human Resource Management, Alexandria, VA, 2002.
4. *In Action: Measuring ROI in the Public Sector*. Patricia P. Phillips, Editor. American Society for Training and Development, Alexandria, VA, 2002.
5. *ROI at Work: Best Practice Case Studies from the Real World*. Jack J. Phillips and Patti P. Phillips, Editors. American Society for Training and Development, Alexandria, VA, 2005.
6. *In Action: Implementing Training Scorecards*. Lynn Schmidt, Editor; Jack J. Phillips, Series Editor. American Society for Training and Development, Alexandria, VA, 2003.
7. *The Leadership Scorecard*, Jack J. Phillips and Lynn Schmidt, Butterworth-Heinemann, Woburn, MA, 2004.

Additional Reading

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In Action: Performance Analysis and Consulting. Jack J. Phillips, Editor & Series Editor, American Society for Training and Development, Alexandria, VA, 1999.

In Action: Coaching for Extraordinary Results. Darelyn J. Mitch, Editor; Jack J. Phillips, Series Editor. American Society for Training and Development, Alexandria, VA, 2002.

Jack J. Phillips, Ph.D.

Jack J. Phillips is a world-renowned expert on accountability, measurement, and evaluation. Phillips provides consulting services for Fortune 500 companies and major global organizations. The author or editor of more than fifty books, he conducts workshops and presents at conferences throughout the world.

Phillips has received several awards for his books and work. On two occasions, *Meeting News* named him one of the 25 Most Influential People in the Meetings and Events Industry, based on his work on ROI. The Society for Human Resource Management presented him an award for one of his books and honored a Phillips ROI study with its highest award for creativity. The American Society for Training and Development gave him its highest award, Distinguished Contribution to Workplace Learning and Development for his work on ROI.

His expertise in measurement and evaluation is based on more than 27 years of corporate experience in the aerospace, textile, metals, construction materials, and banking industries. Dr. Phillips has served as training and development manager at two Fortune 500 firms, as senior human resource officer at two firms, as president of a regional bank, and as management professor at a major state university.

This background led Dr. Phillips to develop the ROI Methodology—a revolutionary process that provides bottom-line figures and accountability for all types of learning, performance improvement, human resource, technology, and public policy programs.

Dr. Phillips regularly consults with clients in manufacturing, service, and government organizations in 44 countries in North and South America, Europe, Africa, Australia, and Asia.

Phillips and his wife, Dr. Patti P. Phillips, recently served as authors and series editors for the *Measurement and Evaluation Series* published by Pfeiffer (2008), which includes a six-book series on the ROI Methodology and a companion book of 14 best-practice case studies. Other books recently authored by Phillips include *ROI for Technology Projects: Measuring and Delivering Value* (Butterworth-Heinemann, 2008); *Return on Investment in Meetings and Events: Tools and Techniques to Measure the Success of all Types of Meetings and Events* (Butterworth-Heinemann, 2008); *Show Me the Money: How to Determine ROI in People, Projects, and Programs* (Berrett-Koehler, 2007); *The Value of Learning* (Pfeiffer, 2007); *How to Build a Successful Consulting Practice* (McGraw-Hill, 2006); *Investing in Your Company's Human Capital: Strategies to Avoid Spending Too Much or Too Little* (Amacom, 2005); *Proving the Value of HR: How and Why to Measure ROI* (SHRM, 2005); *The Leadership Scorecard* (Elsevier Butterworth-Heinemann, 2004); *Managing Employee Retention* (Elsevier Butterworth-Heinemann, 2003)*; Return on Investment in Training and Performance Improvement Programs,* 2nd ed. (Elsevier Butterworth-Heinemann, 2003); *The Project Management Scorecard,* (Elsevier Butterworth-Heinemann, 2002); *How to Measure Training Results* (McGraw-Hill, 2002)*; The Human Resources Scorecard: Measuring the Return on Investment* (Elsevier Butterworth-Heinemann, 2001); *The Consultant's Scorecard* (McGraw-Hill, 2000); and *Performance Analysis and Consulting* (ASTD, 2000). Phillips served as series editor for ASTD's In Action casebook series, an ambitious publishing project featuring 30 titles. He currently serves as series editor for Elsevier Butterworth-Heinemann's Improving Human Performance series.

Dr. Phillips has undergraduate degrees in electrical engineering, physics, and mathematics; a master's degree in Decision Sciences from Georgia State University; and a Ph.D. in Human Resource Management from the University of Alabama. He has served on the boards of several private businesses—including two NASDAQ companies—and several nonprofits and associations, including the American Society for Training and Development. He is chairman of the ROI Institute, Inc., and can be reached at (205) 678-8101, or by e-mail at jack@roiinstitute.net.