

## **FIND OUT HOW ABDI CAN HELP YOUR ORGANISATION TO**

- **Align workplace learning with corporate strategy and specific business metrics**
- **Demonstrate the impact of learning and development interventions**
- **Show how HR contributes to the bottom line**
- **Measure the return on investment of projects and initiatives**

**See [www.abdi.eu.com](http://www.abdi.eu.com) for further details  
and workshop booking**

**To arrange a meeting...  
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## **THE ROI METHODOLOGY**

### **Accountability**

Forward-thinking HR and L&D professionals make vital contributions to organisational strategy and welcome the accountability that comes with greater engagement. To demonstrate impact, you need robust data and a discipline for extracting meaning from the data—in short, the ROI methodology.

The ROI methodology used and taught by abdi specifically addresses the ambiguities in human interventions. Correctly applied, it lets you calculate the return on your organisation's investment in learning and development.

### **Bottom line improvement: but can my intervention take the credit?**

**A vital question, with a three-part answer:**

- Not causality but evidence of a chain of impact
- Impact results are adjusted for the impact of other influences
- Standardisation through twelve guiding principles supports credibility

The ROI methodology links the outcome to the intervention through a chain of impact at five levels:

1. Participant reaction and planned action
2. Participant learning
3. Related operational changes
4. Related improvements in business results
5. Return on investment

The methodology uses a range of techniques to isolate the effects of the intervention from other influences.

Twelve guiding principles standardise the approach and ensure credibility. The ethos is: if in doubt, claim less.

### **Help with process**

The ROI methodology offers case studies, checklists, pro-formas and other tools to help with

- Planning an intervention
- Planning its evaluation—potentially at each of the five levels
- Collecting data
- Estimating what share of the outcome can be attributed to the intervention
- Converting to monetary value

### **Continuous improvement**

The best organisations employ the ROI methodology as more than a means to quantify L&D impact. It is a process improvement tool. Measuring the impact of workplace learning shows up ways to make it more effective.

### **Aren't there alternatives to the approach abdi offers?**

The ROI methodology is the de facto international standard for measuring the impact of L&D and other soft interventions. Plenty of other approaches offer parts of the process and use similar frameworks but none have the long track record that delivers what works in the widest range of real world settings.

## **CLIENTS**

abdi's rapidly growing client list of blue-chip PLCs and major public sector organizations speaks for itself. It includes

<b>AXA</b>	<b>BBC</b>
<b>BT</b>	<b>The British Council</b>
<b>Friends Provident</b>	<b>Financial Services Skills Council</b>
<b>Lloyds TSB</b>	<b>Investors in People</b>
<b>Reuters</b>	<b>NHS</b>
<b>Rolls-Royce</b>	<b>Open University</b>
<b>Volkswagen Group UK</b>	<b>Singapore Workforce Development Agency</b>
<b>VT (Vosper Thorneycroft)</b>	<b>Skills for Health</b>

The list shows how seriously the ROI methodology is now being taken in financial services, telecoms, manufacturing and the public and voluntary sectors.

But virtually every sector now recognises the importance of L&D metrics. In recent years, Abdi Ltd has also trained delegates from retail, hospitality, consultancy, training and publishing companies.

David Vachell, former Head of Learning Strategy & Policy, BT Global Services is one of the UK's most committed and knowledgeable practitioners of the ROI methodology. Here are extracts from an article he wrote for abdi's December 2007 newsletter:

**"I believe that the ROI methodology is a real key to the status of learning & development within organisations. If you think of heart and backbone as two essential organs, where the heart represents the soft side of our work and the backbone the harder more analytical elements, a lot of L&D people tend to be more comfortable with the heart than backbone. You need both. The ROI methodology provides a very effective backbone. As L&D managers become more strategic and professional through use of the methodology, their value to the organisation grows.**

**"Measurement of L&D impact has always been something that management would like to have had, but many didn't believe it was possible to deliver. When I speak to senior finance colleagues they find the methodology familiar and quickly see its potential. They have been extremely supportive in implementing and promoting its use in the organisations that I have worked with."**

## **THE METHODOLOGY IN ACTION**

Writing a case study of an evaluation is a key part of the apprenticeship for ROI practitioners, and the resulting case studies from every sector and type of intervention help other novice practitioners to grapple with the methodology in practice.

This summary of one such case study was created with consultancy support from abdi. The programme was a management development intervention to foster innovation and understanding of the business.

**Flagship Training**--a joint venture between BAE Systems and the VT group, and the Royal Navy's commercial partner in training—faced a contract review and had committed to generating new business. Accordingly in March and April 2006, VT Flagship Training working with Stratagem Consultants provided an intensive assessment and development day for 37 managers.

The development programme benchmarked the managers against Flagship competencies. The delegates received detailed feedback. They were asked to identify practices they would change and to follow up by initiating and implementing a business improvement project.

The business improvement projects not only provided an objective tool for evaluating the development intervention, they also reinforced the learning by challenging delegates in the two competencies where improvement was most needed: 'innovation and change' and 'understanding the business'.

The programme was evaluated at all five levels using the Phillips/ROI Institute evaluation methodology. Level 3 (job performance) evaluation included monitoring the progress of the business improvement projects; level 4 (business impact) evaluation assessed the 16 business improvement projects that reached fruition.

Following the ROI Institute principle, only the first 12 months of cost savings/added income were taken into account. The impact of the programme was isolated from other influences, such as the contribution of colleagues.

The net financial benefit from the 16 projects attributed to the programme was £102K, against programme costs of £55K, despite coinciding with a restructure which prevented more than half of the delegates from completing their projects.

Thus the ROI of the development intervention was 184%.

## **ABDI WORKSHOPS, CONSULTANCY, MASTERCLASSES AND MEETINGS**

Abdi's two- and three-day workshops help you:

- Identify the impact of your training and development
- Isolate the effects from other influences
- Convert outcomes to monetary values
- Present credible results

” This workshop is a must for any organisation serious about its training and professionalism.”

John Hutton, UK Learning & Development Manager, Friends Provident

### **Workshops and certification programme**

Several times a year abdi offers the ROI Foundation Certificate (two-day) and the ROI Evaluator Certificate (three day) workshops on measuring the impact of HR interventions. For dates and booking visit [www.abdi.eu.com/workshops](http://www.abdi.eu.com/workshops). Equivalent in-house programmes can be arranged for clients on request.

Certification by the ROI Institute is awarded on completion of both the workshops and a case study of an evaluation that correctly applies the ROI methodology.

The full certification programme consists of:

- Two-day introductory workshop
- Selection of case study for complete evaluation; optional coaching from Jane Massy in selecting the case and drafting the evaluation strategy
- Three-day certification workshop
- Optional coaching from Jane Massy on implementation and write-up of case study
- Course materials, books and online access to the ROI Institute community, cases etc

### **Masterclasses with Jack Phillips and Jane Massy**

Masterclasses to develop the practice of experienced ROI practitioners are offered at least once a year. See [www.abdi.eu.com/news](http://www.abdi.eu.com/news) for details and booking.

### **Consultancy**

At abdi ltd., we encourage our clients to build their own capability and internal accountability systems so that they can do their own impact measurement. abdi's consultancy services can accelerate this journey and complement the learning that takes place through workshops and case studies. Some clients choose not to build internal capability in impact measurement. They may want the objectivity of an external evaluation. They may find it more cost-effective to outsource. If outsourcing is the right solution for you, abdi should be your choice. No one in the UK has our level of experience or professional expertise in carrying out impact measurement and ROI studies.

## **ROI UK Advanced Practitioners**

abdi has created and supports a forum for UK Advanced Practitioners of the ROI methodology. All group members are in strategic positions to implement the methodology within their organisations. They come together several times a year with a programme of

- dinner meetings,
- in-house meetings and
- research.

The ROI UK Advanced Practitioners' network provides

- peer support,
- benchmarking and
- conference speaking opportunities.

For details, see abdi's newsletter or [www.abdi.eu.com/news](http://www.abdi.eu.com/news)

## **DATES AND FEES FOR ABDI WORKSHOPS**

### **2010 dates for open-booking two-day workshops:**

March 8-9

June 21-22

September 20-21

November 15-16

### **2010 dates for open-booking three-day (certification) workshops:**

June 23-25

November 17-19

### **2010 workshop fees**

Two-day open-booking workshops: £925 plus VAT per person

Two-day in-house workshops: from £7500 plus VAT for up to ten persons

Three-day (certification) open-booking workshops: £1375 plus VAT per person

Three-day (certification) in-house workshops: from £11,500 plus VAT for up to 10 persons

Coaching: From £165 plus VAT per hour (optional and can be tailored)

Cancellation fees: see cancellation policy downloadable from [www.abdi.eu.com/services](http://www.abdi.eu.com/services)

## **OBJECTIVES AND AGENDAS FOR ABDI WORKSHOPS**

You can download full workshop agendas and the full lists of workshop objectives by level from [www.abdi.eu.com/services.html](http://www.abdi.eu.com/services.html)

Two-day workshop objectives include...

- Identify costs of a programme and calculate ROI
- Develop an evaluation plan for a specific programme
- Improve the effectiveness of programmes

Two-day workshop outline agenda:

- Overview of the ROI model and process
- Developing evaluation strategy
- Developing programme objectives
- Data collection strategy
- Data analysis
- Calculating ROI

Three-day (certification) workshop objectives include...

- Critically analyse data at all five levels
- Identify weaknesses in evaluations
- Execute a complete evaluation study of delegate's choice
- Brief internal colleagues in the ROI methodology
- Show the contribution of HR investments to the business

Three-day (certification) workshop outline agenda:

- Review of ROI methodology
- Review of planning steps
- In-depth review of data collection and analysis
- In-depth review of isolation techniques
- In-depth review of conversion to money, costs and calculations
- Reporting and forecasting
- Supported work on own project, culminating in presentation to group

## EVALUATION OF PUBLICLY FUNDED PROJECTS AND INITIATIVES

The ROI methodology offers an ideal discipline for evaluating and benchmarking publicly funded projects, capturing achievements against targets and (if required) value for money. Delegates from the public and voluntary sectors attend abdi's workshops to acquire the skills to report meaningfully on project outcomes.

abdi itself has an international track record in evaluating publicly funded projects and government initiatives. Below are details of some of abdi's current and recent project evaluations and public sector consultancy:

- abdi ltd has been the official evaluator for [Equal-Invest](#), a 2007 development project for social enterprises funded under the Equal initiative (ESF) in the UK. abdi used the ROI methodology to create a framework and standards for measuring the impact of the project on the fifteen social enterprises being developed.

Now that the project is complete, abdi is using the ROI scorecard approach to evaluate the project overall, assessing impact and value.

- abdi has been awarded a contract by the [European Social Fund Office of the Czech Government](#) on behalf of the ESF to moderate a community of interest on impact evaluation which will inform ESF round 2007-2013.
- abdi has been developing an evaluation strategy for an innovative partnership project between [NHS Yorkshire and the Humber Strategic Health Authority](#) and the regional Learning and Skills Council. The partnership will be primarily (though not exclusively) aimed at delivering skills across the NHS regionally through the LSC's flagship Train to Gain programme.

abdi has helped to design the evaluation strategy using the ROI framework in order to show the partnership's impact and value to the stakeholders (NHS, LSC and participating Trusts) and is supporting the strategy's implementation.

- In 2006, abdi worked with the [Singapore Workforce Development Agency](#) to build an evaluation system to be used to measure the impact of all publicly funded workforce education and training interventions for the sectors that are considered to be the main drivers for the future growth of the Singapore economy to 2020.

## **BACKGROUND ON ABDI AND ITS DIRECTORS**

abdi ltd was set up in 2006 by Jane Massy and Jeremy Harrison to promote excellence in UK organisations of every sector in measuring the impact of learning and development. abdi works with clients to build their capability and systems to this end.

CEO [Jane Massy](#) is the UK's most experienced ROI practitioner and has been working as an evaluator in the domain of learning and development since 1993. She has extensive experience working with international businesses in many sectors and in evaluating research into workplace learning and labour market interventions for national governments, the EU and NSF funded programmes.

In 2004, Jane Massy's consultancy became the sole UK partner of the ROI Institute. Since then the consultancy has used the ROI methodology in client contracts and taught the methodology to others through in-house and open-booking workshops.

[Jeremy Harrison](#), a specialist in evaluation, spent some twenty years as a consultant to the European Commission working on both policy and programmes in Brussels. The bulk of his current work relates to UK and European funding programmes.

He is now widely applying the ROI methodology to these evaluations and helping the European Commission and its partner governments review the use of outcomes evaluation in funding programmes.

abdi practices what it preaches. The aims of workshops and consultancy interventions are explicit. abdi evaluates the outcomes using the ROI methodology. Lessons learned are fed back into continuous improvements to the service and to the process of attaining ROI certification.

The ROI Institute is a global network of organisations engaged in research, benchmarking and consultancy on the ROI methodology developed in the US by Jack Phillips.

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