

Sara Pearson - embedding ROI in an NHS Trust

'It's thoroughly interesting', says Sara Pearson who's embedding the ROI Methodology in learning and development planning and evaluation at Hull and East Yorkshire NHS Trust where she's Head of Workforce Development. 'I'm now dying to get some impact data.'

She completed the ROI Foundation course in February and the ROI Evaluator course in June.

'I think you need the higher level (ROI Evaluator Certificate),' she says, 'if you're really going to apply it. I really started to get into it after the three day course.'

A huge amount of her effort since June has gone into laying solid foundations. Into thinking things through, and especially into working with Finance to establish fully loaded costs and developing standard values and metrics.

She says: 'I think too many people go too quickly. You just need to take the time to think about how you're going to use the ROI Methodology.'

'All our programmes in education and development have now been categorised to the levels to which they will be evaluated. All those with high impact and high costs will be evaluated at least to Level 4, and we've now devised some project implementation documentation with the evaluation methodology embedded.'

'I've worked with some of the staff and developed some pre- and post- self assessment templates so when we put new projects together we've already got Levels 1, 2, and 3 data collection instruments ready. I haven't done a full evaluation yet because the programmes are just starting.'

And the result? 'We are thinking about things differently when we put new programmes together. We're asking, *What's the payoff? What business impact do we want?*

'You do need buy-in at the top for this,' she adds, 'and my advice to anybody is to take the time and think through properly how ROI is going to be implemented, who's going to do it. It's not a short term project, but we hope to be completely up and running by the end of the year.'