

## Objectives, agendas and fees for abdi's workshops

Organisations of all types and sizes are under increasing pressure to account for the money they invest in their people and projects and programme.

The demand to be able to do this is rising rapidly, particularly for projects and programmes that:

- have a long life cycles,
- are linked to key organisational goals and objectives,
- are relatively expensive,
- have high internal or external visibility,
- address large target audiences.

Most fail to do this with any consistency or credibility because they neither plan for nor collect the data they require.

The abdi ROI UK Foundation Award provides an introduction to the framework, tools and disciplines required to plan for impact, and then to track it and report its achievement.

The abdi ROI UK Evaluator Award and the Postgraduate Certificate in Impact and Performance measurement cover more advanced sections of the methodology, covering various aspects from Data Collection, Isolation, and Action Planning to Implementation for your project.

The abdi ROI method has been developed from the work of Donald Kirkpatrick in the 1950s, and subsequent additions by Jack Phillips from the 1970s.

It is based on six levels of data that can be used to form a chain of impact, establishing a credible connection between an investment and the impact outcomes that are claimed to have been achieved as a result of it.

## The abdi ROI method

The abdi ROI method is increasingly used in both the private and the public sectors. It draws extensively on the work of Dr Jack Phillips, the Kirkpatrick data framework, Theory of Change model and Logic Models as well as good project management techniques.

It is widely recognised as the best of the best, and these Awards help to reinforce the building of a new standard of professionalism. Higher level awards and a Postgraduate Certificate in Impact and Performance Measurement offer the opportunity for continuing professional development following successful achievement of the abdi ROI UK Foundation Award.

## Objectives for abdi's 2 day Foundation Workshop

### Learning Objectives – Be able to:

- Identify the drivers for ROI accountability
- Link project objectives to business results
- Identify at least three (3) ways to collect data
- Identify costs of a project and calculate ROI
- Identify intangible measures
- Describe the ROI Methodology™

### Application Objectives (to be applied in following 3-6 months):

- Plan an evaluation up to and including ROI
- Complete a Data Collection plan for the evaluation
- Draft an ROI Analysis Plan for the evaluation
- Schedule your evaluation
- Prepare the first changes in improving planning, measurement and reporting in your organisation

### Impact Objectives (to be achieved as a result of application):

- Improve the effectiveness of projects
- Expand the implementation of successful projects
- Discontinue ineffective projects
- Improve satisfaction of your stakeholders

***After acquiring your abdi 2 day Foundation Award, you can choose to either enrol yourself for our 3 day Evaluator Award, or to apply for our Postgraduate Certificate Programme accredited by the University of Derby.***

## Objectives for abdi's 3 day Evaluator Workshops

### Learning objectives

At the conclusion of the workshop, participants will have learned to:

- Prepare a full evaluation plan
- Prepare at least three types of data collection instruments
- Critically analyse data at all five levels
- Apply a variety of isolation techniques in different case studies
- Calculate monetary values
- Present the results of a completed case study
- Plan an implementation strategy

### Application objectives

After returning to the job environment, participants should:

- Build a credible business case for ROI in the organisation
- Complete a detailed evaluation plan for a specific programme
- Revise/Update internal policy/practices on evaluation
- Execute a complete evaluation study of their choice
- Present evaluation report to selected audiences
- Brief internal colleagues in the ROI methodology

### Impact objectives

When the ROI methodology is implemented, the following consequences should be realised:

- Show the contribution of HR investments to the business
- Improve the effectiveness and efficiency of programmes
- Expand the implementation of successful programmes
- Redesign or discontinue or ineffective programmes
- Build more productive relationships with clients and executives
- Deliver decision-making information that can assist the organisation plan and grow its capability to deliver on its strategy and business targets

## **Objectives of abdi's Postgraduate Certificate Programme in Impact and Performance Measurement**

### **At the end of the course you will:**

- 1.** Be able to describe and critically analyse at least four different methodologies used in evaluating human capital investments, reflect on their features and recommend the most appropriate contexts for application of each
- 2.** When evaluating a project or programme, be able to allocate the data available into appropriate data types, analyse how well the outcome data items are developed and 'fit' the data level, critique the process of planning, monitoring and evaluation undertaken and provide a detailed analysis of the credibility of the results
- 3.** Select & critique appropriate data collection approaches and instruments to be used in the evaluation of different contexts
- 4.** Be able to prepare reports on the analysis of data at Levels 1-4 and costs.
- 5.** Be able to decide when it is credible to convert to money value and demonstrate how to calculate the monetary value of tangible impact measures
- 6.** Select and apply the main isolation techniques and calculate the value for money (ROI) results
- 7.** Critically evaluate and recommend the steps to be taken to implement a results based approach to human capital investments in different organisational and socio-economic contexts
- 8.** Plan, monitor, analyse and report the results up to and including ROI for an actual workplace project
- 9.** Write a full report on the project, including an executive summary
- 10.** Be able to present the results to a senior management team
- 11.** Plan your next steps in your implementation of what you have learned including developing innovative ways forward and developing novel approaches to systems' changes

# Agenda for two-day introductory workshops

(Subject to minor changes in sequence)

## Day One

Welcome. Review Materials

### 1. Intro and Readiness to Learn

- Activity: Case Study: (Tailored for sector appropriate to participants)
- Brief Discussion - Pre-work
- Definition of Results-Based Training

### 2. Overview of the ROI Process

- Levels of Evaluation
- Defining BCR and ROI
- Setting Evaluation Targets
- Breakdown of the ROI Model
- Criteria for Selecting Programmes for Level 4 & Level 5 Evaluation
- ROI Target Options
- Discuss application

### 3. Activity: Case Study: Tailored

### 4. Developing Evaluation Strategy

- Working With Hard and Soft Data
- Results-Based Process
- Linking Needs Assessment with Evaluation
- Activity: Case Application: Tailored
- Matching Evaluation Levels with Objectives

### 5. Activity: Developing Objectives for your selected course

- Learning
- Application/Behavior
- Business Impact
- Discuss application

### 6. Data Collection Strategy

- Discuss data collection issues
- Designing Data Collection Strategy
- Collecting Baseline Data
- Activity: Credibility of Data
- Post-programme Data Collection
- Activity Complete the Data Collection Plan for your selected course

## Day Two

### 7. Data Collection (continued)

- Activity: Review Sample Data Collection Plans
- Activity: Review tailored case data – Sample Questionnaire

### 8. Developing ROI with Action Plans

- Activity: Action Plan application and ROI Calculation

### 9. Data Analysis (brief overview)

- Isolating the Effects of Training
- Converting Data to Monetary Value

### 10. Calculating ROI

- Activity: Calculating the Required ROI
- Activity: A Case of the Intangibles

### 11. Reporting

- Reporting Tangible and Intangible Data to Senior Management

### 12. Post Workshop Evaluation

# Agenda for three-day Evaluator workshops

## Day one

- Welcome and Introductions
- Review of ROI Methodology.
- Allocation of case studies (see below)
- Review of planning steps
- In-depth review of data collection – includes case studies
- In-depth review of data analysis - includes case studies
- Work together on case studies

## Day two

- In depth review of Isolation techniques – includes case studies
- First case study presentations
- In depth review of conversion to money, costs and calculations – includes case studies
- Second case presentations
- Work on own projects in preparation for presentation on Friday

## Day three

- In depth review of reporting – includes case studies
- Project presentations
- In depth review of forecasting– includes case studies
- In depth review of implementation – includes case studies
- Remaining planned project presentations
- Presentations of implementation plans
- Wrap up and thanks

## **Fees and cancellation policy**

### **Open-booking workshops: two-day introductory**

Workshop fee: £925 plus VAT per person

### **Open-booking workshops: three-day certification and coaching**

Workshop fee: £1375 plus VAT per person

Coaching: from £220 plus VAT per hour (optional and can be tailored)

### **Postgraduate Certificate in Impact and Performance Measurement**

Full course fee: £3000 plus VAT per person

### **Cancellation policy for open-booking workshops**

To cancel or transfer to a future workshop within 4 weeks of the first day of an open-booking workshop: a fee of £150 will be charged for the 2 day and £250 will be charged for the 3 day.

To cancel or transfer to a future workshop prior to 4 weeks of the first day of an open-booking workshop: a fee of £50 will be charged for both the 2 day & the 3 day.

If transferring to a workshop which has been subjected to a price increase, the delegate will be invoiced for the additional charge.

abdi Ltd retains the right to cancel workshops due to unforeseen circumstances.

### **In-house workshops: two-day introductory**

Workshop fee: from £7500 plus VAT for up to ten persons

### **In-house workshops: three-day certification and coaching**

Workshop fee: from £11,500 plus VAT for up to 10 persons

Coaching: from £220 plus VAT per hour (optional and can be tailored)

### **Cancellation policy for in-house workshops**

Cancellation within 4 weeks of the first day of the workshop, a fee of 25% of the full fees will be charged, or 10% if transferring to another agreed date.

Cancellation prior to 4 weeks of the first day of the workshop, a fee of 10% of the full fees will be charged, or to transfer to a future workshop there will be no fee charged.

If transferring the date of a workshop to a period subjected to a price increase, the client will be invoiced for the additional fee charge.

abdi Ltd retains the right to cancel workshops due to unforeseen circumstances.