



# Evaluation, Impact and Return on Investment Strategy

HR People and Organisational Development

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## Introduction

To evidence how People and Organisational Development (P&OD) support both individual and organisational improvements, and with our principle of continuous improvement, we will thoroughly analyse the impact of all our development activities. Staff are expected to evaluate each development activity they attend, and work with their line managers to discuss how the learning can be used in their roles. This Evaluation, Impact and Return on Investment (ROI) strategy allows us to measure satisfaction levels, the transfer of learning, as well as our wider organisational culture indicators.

## Aims of this strategy

Aligned to the 2025 Strategy Map, this document provides the blueprint through which we can measure and evidence our impact. The intention is to provide a simple and clear model to underpin our approach to evaluation, and to be specific enough to enable operational plans to be put in place.

## Context

Our University is facing increasing pressures from a combination of factors, and operates within an ever more competitive environment, especially since the Covid 19 pandemic. Responding to these challenges requires a culture of high-performance, where learning and development and continuous improvement is supported, encouraged, and embedded.

## Scope

This strategy applies to all staff working at our University, full and part time, permanent and temporary. Wherever possible, P&OD activity will be integrated for both academic, professional services and technical services staff, and across Schools and Services, to help foster better collaborative working and learning.

## Our Development Cycle

We take a systematic approach, as outlined below:



Please see our People and Organisational Development Strategy for further details about the stages of our development cycle.



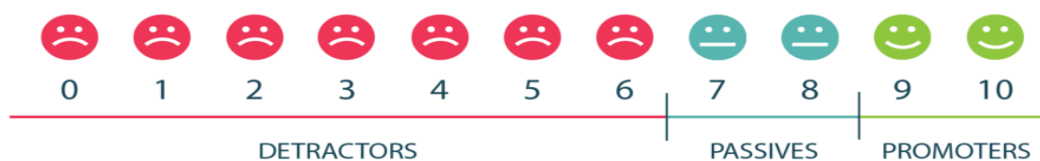
## Our Approach to Evaluation (the Levels)

Given the diversity of our development activities, a 'one size fits all' approach to evaluation would not be inappropriate. Our method, outlined below, and is based on a flexible framework with 5 distinct levels, with each level providing distinct data.



## What is the Net Promoter Score?

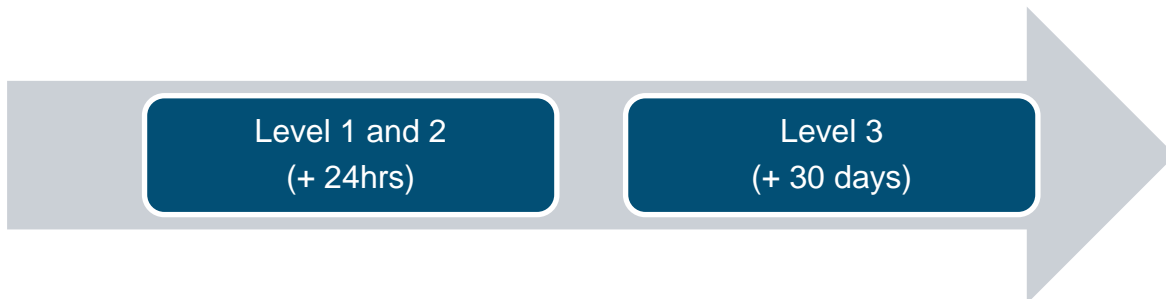
The Net Promoter Score (NPS) is a widely used way to measure satisfaction and is included on P&OD feedback surveys. The NPS is based on the question "How likely is it that you would recommend this x to a colleague?" based on a scale of 1 (not at all likely) to 10 (Extremely likely). Based on their responses, participants can be categorised into one of three groups: promoters, passives, or detractors. Promoters are likely to recommend a session to others, while detractors might do the opposite. The higher the NPS, the greater the level of satisfaction. We will work with our stakeholders to set appropriate benchmarks for our NPS.



$$\text{😊 \%} - \text{😞 \%} = \text{NET PROMOTER SCORE}$$

## Evaluating our Sessions (Level 1-3)

Our internal development programme consists of several facilitated sessions (workshops), categorised by theme. Typically, these sessions last up to a day.

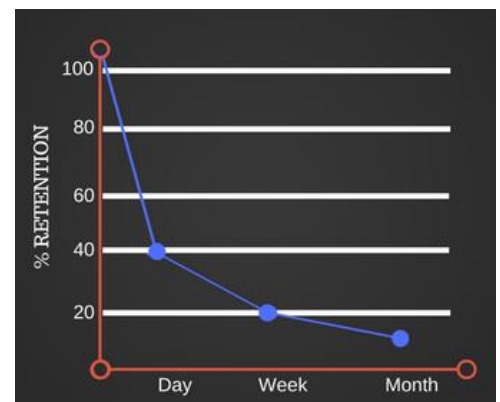


### Level 1 and 2: Satisfaction and Learning

Using our online system, we gather participants' feedback on our sessions within 24 hours after completion. However, positive feedback at Level 1 does not necessarily mean that participants have learned something new. Our Level 2 questions are concerned with measuring the extent to which learning has taken place.

### Level 3: Impact

Research by German psychologist Hermann Ebbinghaus found that we forget over 80% of what we learn within 30 days unless we do something with the learning. For example, repetition will significantly increase our chances of remembering what we learned over the longer term. His work became known as the Forgetting Curve.



With the Forgetting Curve in mind, to see if our development activities have been impactful, and learning has 'stuck', we ask participants follow up questions after this 30-day period has passed (using our online system).

## Evaluating our Programmes (Level 1-5)

Deciding what and how much to measure is crucial and based on criteria such as cost or strategic importance. Our management and leadership and coaching programmes typically last between 6 and 12 months and are central to both the *PeopleFirst* agenda and wider 2025 University Strategy Map aspirations, therefore our approach to evaluation uses levels 1-5, and a combination of methods.



### Pre-Programme: Setting Objectives

To measure at levels 4 and 5, participants must consider what success from our programmes looks like for them and set personal SMART-based objectives before they start. Participants should work with their line manager to set these objectives, and ensure they are quantifiable, using hard and/or soft measures. Line managers should support their staff throughout the duration of a programme, helping them embed their learning in the workplace, providing feedback, and ensuring the original objectives set before the programme remain relevant.

### Level 1 and 2: Satisfaction and Learning

As with our sessions, we gather participants' feedback on our programmes within 24 hours after completion, to gauge their experience and enable further probing at levels 3-5.

### Level 3: Impact

To measure impact and the transfer of learning, we ask participants follow up questions a minimum of 1 and maximum of 3 months after they completed the programme (using our online system). In addition, participants on our CMI-accredited management and leadership programmes present their findings, ideas, and learning to the Vice-Chancellor.

## Levels 4 and 5: Results and Return on Investment

These levels are usually the hardest to measure. We will gather participants' feedback a minimum of 3 and maximum of 6 months after they finished the programme. This timescale is to allow for participants to fully embed what they have learned into their roles. Participants are asked a range of in-depth questions, for example, has the learning led to any strategic or operational changes, or the monetary value of any specific business accomplishments. We calculate the return on investment by comparing the cost of the programme against the benefits it has brought, using participants pre-programme objectives as a basis for our calculations. Further details and example questions can be found in Appendix A. In addition, as our key stakeholders, an interview with the Vice-Chancellor and HR Director explores the institutional perspective at levels 4 and 5.

## Sample Options for Evaluating at Levels 1-5

- ❖ Questionnaires and surveys
- ❖ Interviews
- ❖ Focus groups
- ❖ On-the-job observation
- ❖ Performance contracting
- ❖ 360-degree feedback (test and re-test)
- ❖ Psychometric self-assessment (test and re-test)
- ❖ Analysing workforce performance data
- ❖ Knowledge transfer assessments, i.e., conducting an assessment pre- and post-session to assess transfer of learning.





## Our People and Organisational Development Dashboard

Our P&OD dashboard provides us with a visual representation, informed by credible metrics, about Schools and Services engagement with learning and development activities, as well as broader indicators about our organisational culture, as outlined below.

### Measuring Engagement with Learning and Development

- ❖ **Attendance on Sessions:** we will gather data that shows the number of internal programme sessions delivered, and number of participants on these sessions, both as a whole, as well as from individual Schools and Services.
- ❖ **Participant Satisfaction on Sessions:** based on our approach to evaluation (level 1-3) and including the average NPS for each of our sessions.
- ❖ **Attendance on management, leadership, and coaching programmes:** we will gather data that shows the number of participants on our programmes, both for the University as a whole, as well as from each School and Service.
- ❖ **Percentage of Chartered Managers:** It is a requirement for all University people managers to become a CMgr. We will gather data that shows the percentage of people managers who are CMgrs, both for the University as a whole, as well as from each School and Service.
- ❖ **Management, Leadership and Coaching ROI:** based on our approach to evaluation (level 1-5).
- ❖ **Bespoke Sessions and Team Building:** we will gather data that shows the number of bespoke sessions or team builds we have delivered, and the number of staff who have attended these sessions, both for the University as a whole, as well as for each School and Service.
- ❖ **Coaching and Mentoring:** we will gather data that shows the number of active coaches and coaches, mentors, and mentees, both for the University as a whole, as well as for each School and Service. This data will only be based on the more formal C&M relationships coordinated through P&OD.

### Measuring Organisational Culture Indicators

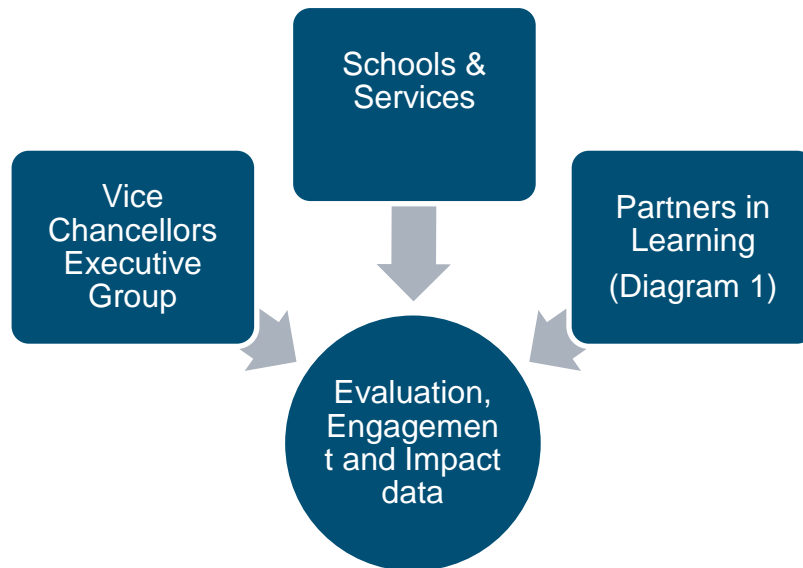
- ❖ **People First Management and Leadership KPI:** our 2025 Strategy Map KPI is for the University to be in the Quality of Working Life (QoWL) sector upper quartile for good management practice. We will gather data that shows how the University, as well as individual

Schools and Services are performing against this KPI, based on the results of the Quality of Working Life Survey.

- ❖ **People First Engagement and Satisfaction KPI:** our 2025 Strategy Map KPI for engagement and satisfaction is for the University to be in the Quality of Working Life (QoWL) sector upper quartile for measure for engagement and satisfaction. We will gather data that shows how the University, as well as individual Schools and Services are performing against this KPI, based on the results of the Quality of Working Life Survey.
- ❖ **HR Culture Indicators:** we will gather data that from several HR indicators that provide us with important information about our work environment and culture. These indicators include internal promotions, turnover, dignity at work cases, disciplinary cases, and grievance cases, both for the University as a whole, as well as for each School and Service.
- ❖ **Mandatory Training:** our Learn-Upon (e-learning) modules include mandatory training all staff need to undertake, and some of which requires regular refreshers. We will gather data that shows the completion rates for all the mandatory Learn-Upon modules, both for the University as a whole, as well as for each School and Service.
- ❖ **Personal Development and Performance Reviews (PDPR):** all permanent and fixed term staff are expected to have an annual PDPR (appraisal) unless they are still in their probation period. We will gather data that shows the PDPR completion rates (for Academic, Professional Services and Technical Services staff), both for the University as a whole, as well as for each School and Service.
- ❖ **Induction and Settling In:** we will gather data that shows how satisfied new starters are with their induction process (based on the NPS), after they have been role for 3 months. In addition, we will measure the percentage of new starters leaving within less than 12 months' service, both for the University as a whole, as well as for each School and Service.

## How we use our Evaluation, Engagement and ROI data

We will periodically review our entire offering to fine tune what we do. This includes analysing the feedback from all our sessions and programmes to ensure meet our NPS benchmarks, suit the current climate, and are aligned with our principles and approach. Using our business partnering approach and the data in our P&OD dashboard, we will support Schools, Services, and other stakeholders (please see below) to analyse what the data means for each of them.



## Key Roles and Responsibilities

This strategy will require ownership, accountability, and commitment from a number of areas and people. Please see our People and Organisational Development Strategy for further details

## Related P&OD Documents

- ❖ People & Organisational Development Strategy.
- ❖ Developing Great Leaders Strategy
- ❖ Coaching and Mentoring Strategy.
- ❖ P&OD Guidelines and FAQs.

## Review

The current HE environment is fast paced, demanding and constantly evolving. With this in mind, we frequently review what we do, how we do it, and how we measure success. This strategy itself will be reviewed annually, with any changes being acted upon ready for the following academic year.



## Appendices A: Sample Questions (Level 1-5)

### Sessions (Workshops)

#### Level 1 and 2: Satisfaction and Learning

- ❖ Was the session useful for me? (rating scale)
- ❖ Was the session presented clearly? (rating scale)
- ❖ How can we improve this session?
- ❖ Do you have any other comments you'd like to make about your overall experience of this session? (e.g., booking process, room facilities, catering)

#### Level 3: Impact

- ❖ What are you doing differently because of this training?

### Programmes

#### Pre-Programme: Setting Objectives

- ❖ What change do you want to see?
- ❖ What will it look like when it has changed?
- ❖ What direct or indirect measures reflect the change?
- ❖ Will your learning have a financial benefit to the University, School, or Service?

#### Level 1 and 2: Satisfaction and Learning

- ❖ The programme objectives have been met. (rating scale)
- ❖ What I learned in the programme is useful to me. (rating scale)
- ❖ My action learning set was useful. (rating scale)
- ❖ The sessions were useful. (rating scale)
- ❖ The one-to-one coaching or mentoring was useful. (rating scale)
- ❖ The assessment was relevant to my role. (rating scale)
- ❖ Overall, I received enough support from the P&OD team. (rating scale)
- ❖ How can we improve the programme?
- ❖ Do you have any other comments you'd like to make about your overall experience of this programme? (e.g. booking process, room facilities, catering)

#### Level 3: Impact

- ❖ What are you doing differently because of this programme?

#### **Levels 4: Results**

- ❖ On reflection, do you feel the learning was relevant to your role?
- ❖ Did your learning from the programme lead to any strategic or operational changes?
- ❖ My understanding of the University's Strategy Map has increased as a result of this programme. (rating scale)
- ❖ My understanding of the factors that influence the University's Strategy Map have increased as a result of this programme. (rating scale)
- ❖ I am more aware of your stakeholders' needs and their influence as a result of this programme. (rating scale)
- ❖ My understanding of how my area of responsibility related to the University's Strategy Map increased as a result of this programme. (rating scale)
- ❖ Did you value being able to present your findings to our Vice-Chancellor?
- ❖ The Chartered Manager initiative is helping to bring a sense of community to our managers and leaders? (rating scale)
- ❖ Please outline how becoming Chartered has helped improve your, or others', management, and leadership skills.

#### **Continuous Improvement**

- ❖ Of the programme modules you've completed so far, which has been the most/least useful?
- ❖ How can we improve this programme?
- ❖ What barriers, if any, have you encountered that have prevented you from using the learning from the programme?
- ❖ What additional support could be provided by your line manager that would influence your ability to use what you have learned on the programme?
- ❖ How would you describe this programme other people?
- ❖ Please briefly summarise the value of this programme to you and your role.

#### **Levels 5: Return on Investment**

- ❖ Did you have any personal objectives prior to starting this programme?
- ❖ Did you set your personal objectives in conjunction with your manager?
- ❖ My personal objectives were met. (rating scale)
- ❖ Reflect on your specific business accomplishments/improvements.

- ❖ Please convert your accomplishments into a monetary value. Total estimated monetary amount £ x
- ❖ Along with the monetary value, please indicate your basis for the calculations.
- ❖ Indicate if above amount is weekly, monthly, quarterly, or annually.
- ❖ What level of confidence do you place on the above estimations? (rating scale 0% = no confidence 100% = certainty)
- ❖ What percentage of the improvement above was influenced by participation on the programme? (rating scale 0% = None 100% = All)
- ❖ Summarise the impact of these performance indicators/measures on your work area.
- ❖ As a result of the programme, as an overall percentage, do you feel you are more effective in your role? (rating scale none %, 0 – 25 %, 25 – 50 %, 50 – 75 %, 75 – 100 %) NB: calculate ROI against grade.
- ❖ Are there any other specific business accomplishments, improvements, or issues you'd like to mention because of the programme?

**Interview with the Vice-Chancellor and HR Director will explore the institutional perspective.**

- ❖ What institutional challenges did the programme aim to tackle?
- ❖ Has the programme solved that issue? If so, how?
- ❖ Has the programme affected engagement and productivity at our University?
- ❖ How has the programme improved the culture of the University?
- ❖ If we could start again, is there anything you would have liked to do differently?

## Calculating the Return on Investment

Formulas:

Benefit / Cost Ratio = Programme Benefits / Programme Costs

ROI = Net Programme Benefits / Programme Costs x 100

Example:

Programme Benefits from delegates = £143,000

Programme Cost (20 participants) = £55,000

Benefit / Cost Ratio = £143,000 / £55,000 = 2.6

ROI = £143,000 - £55,000 / 55,000 x 100 = 160 %



