

## Five Steps to the Money

1

**Determine the unit measure.**

The monetary value of the measure of interest

2

**Determine the value of the measure.**

The monetary value of the measure of interest

3

**Determine the change in performance.**

The output of your Level 4 evaluation indicating the change in the business measure due to the program (after isolation)

4

**Determine the annual change in performance.**

ROI is reported as an annual percentage returned.

5

**Calculate the annual monetary benefit.**

Multiply the annual change (step 4) by the value of one unit (step 2)

## Sexual Harassment Prevention Workshop

- Target Group: All supervisors and managers (655) with subsequent meetings with all employees (6,844)
- Data Collection
  - (3) Self Assessment Questionnaire – 6 months after program
  - (3) Employee Survey (25% sample) – 6 months after program
  - (4) Complaint and Turnover Records – 12 months after program
- Isolating the Effects of the Program
  - Complaints – Trend line Analysis
  - Turnover – Forecasting
- Converting Data to Monetary Values
  - Complaints – Historical costs and input from experts (internal EEO/AA staff)
  - Turnover – External studies within industry
- Program Costs
  - Fully loaded to include needs assessment, development, coordination, participant salaries and benefits, and evaluation
  - Total Costs = \$277,987
- Program Benefits
  - Complaints
    - Value of one internal complaint = \$24,343
    - Annual improvement related to program = 14.8 complaints (prevented)
    - \$ \_\_\_\_\_
  - Turnover
    - Value of one turnover statistic = \$20,887
    - Annual improvement related to program = 136 turnovers (prevented)
    - \$ \_\_\_\_\_

Calculate the following:

$$\text{BCR} = \frac{\text{Total Benefits}}{\text{Program Costs}} = \underline{\hspace{2cm}}$$

$$\text{ROI} = \frac{\text{Total Benefits} - \text{Program Costs}}{\text{Program Costs}} \times 100 = \underline{\hspace{2cm}}$$

- Intangible Benefits
  - Job Satisfaction, absenteeism, stress reduction, community image, and recruiting