ROI INSTITUTE®

ROI Boot Camp – Select *One* Option

It is required that each participant complete ROI Boot Camp as a prerequisite for attending ROI Certification. ROI Boot Camp will take approximately six hours to complete. During ROI Boot Camp, participants will be introduced to:

- The Need for ROI
- The ROI Methodology
- Types of Data
- Designing for Results
- Case Application

Participants will select *one* of the following options to complete the required ROI Boot Camp:

Option 1: Live, Facilitated, Virtual RoI Boot Camp (*select one date*)

March 27th, 2024, 10:00 am – 4:00 pm ET

Facilitator:

Katharine Aldana

Katharine Aldana, a two-time "ROI Practitioner of the Year" award winner, is known for her creative program improvement strategies. Katharine spent seven years designing learning strategies and performing program evaluations for a Fortune Top 20 organization before transitioning to her current role as Manager-Business Strategy within the same organization. Katharine's enthusiasm for program effectiveness and real-world experience make her a dynamic facilitator and highly sought-after ROI implementation resource.

OR

June 13th, 2024, 10:00 am - 4:00 pm ET

Facilitator:

Faith Krebs

Faith Krebs is a master performance consultant and the business owner of "The ROI Generator." She is a trusted business advisor who coaches leaders and business owners how to optimize and accelerate business results. Faith has consulted with small, mid-size, and Fortune 500 companies to address their business needs. She partners with her clients to develop customized performance solutions that improve top and bottom-line growth, the work environment, and employee engagement to create an agile, proficient, and productive workforce.

OR

Option 2: On-Demand, Self-Paced RoI Bootcamp (*Directions to access the On-Demand RoI Bootcamp option through the RoI Institute Academy will be provided upon registration and payment.)*

Selecting Your Project for ROI Certification (Webinar)
Tuesday, July 9th, 2024, 1:00 – 4:00 pm EST

To become a Certified ROI Professional, you must participate in the comprehensive learning course and conduct an evaluation study that measures the impact and ROI of a project or program. This two-hour live virtual session will focus on selecting a project or program to evaluate. Below are issues to consider when selecting a project or program to evaluate.

1. **Make sure a stakeholder cares about project results**. If no one cares about the results, then there is no need to do the evaluation. At the end of the project, there should be at least one stakeholder (usually more) who wants to see the results, because they care about the results.
2. **Move from simple to complex.** If you have a choice, your first project should be simple. You can evaluate more complex projects in additional studies. Save world peace until much later.
3. **Try to select a project that is not too politically charged.** Almost every project will have supporters and detractors. A highly charged political atmosphere can make the study difficult to present, and your presentation could turn into a debate.
4. **Expensive projects need this level of evaluation.** The more expensive the project, the more it requires this level of accountability. If a project costs only $1,000 per classroom, or $200 per teacher, or $25 per student, there is probably no need to show the value at the ROI level. But if the project costs $20,000 per classroom, $5,000 per teacher, or $200 per student, maybe it should be evaluated at the ROI level.
5. **The project should address an important issue.** Is it a problem you are trying to solve or an opportunity that you want to pursue? Is it important for the school or district to see the value?
6. **Consider a project that attracts the interest of administrators**. The leaders in the school system may have concerns about some projects and less worry about other projects. A project that will attract their attention is a good project for this type of analysis.
7. **Highly visible projects bring out the critics.** If the project is highly visible, it may need this level of accountability to satisfy the critics.

Projects can be completed either individually or in teams. However, the more projects you complete in each district, the more beneficial it will be.

At the onset of the program, you will be asked to provide a description of your project, including a couple of paragraphs describing the project, why you selected it, and the impact measures you are driving with this project.

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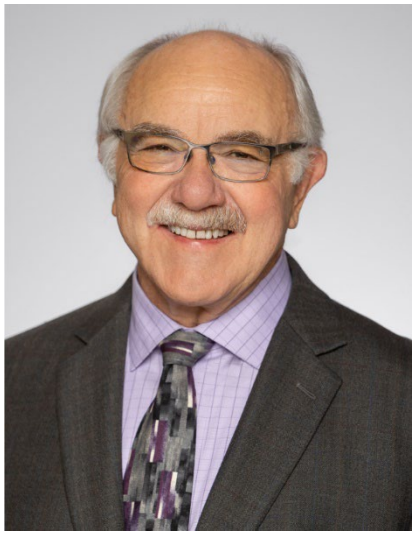
ROI Certification

Tuesday, July 16th, 2024, 9:00 am – 4:30 pm ET
Wednesday, July 17th, 2024, 9:00 am – 4:30 pm ET
Thursday, July 18th, 2024, 9:00 am – 2:00 pm ET

Meeting Location:
Orange County Public Schools
445 W. Amelia Street
Orlando, FL 32801

Facilitator:



Jack J. Phillips, Ph.D., chairman of ROI Institute, is a world-renowned expert on accountability, measurement, and evaluation. Jack provides consulting services for Fortune 500 companies and major global organizations, and regularly consults with clients in manufacturing, service, and government organizations in 70 countries. The author or editor of more than 100 books, he conducts workshops and presents at conferences throughout the world and has received several awards and honors for his work.

Jack has enjoyed almost 30 years of corporate experience in the aerospace, textile, metals, construction materials, and banking industries. He has served as training and development manager at two Fortune 500 firms, as senior human resource officer at two firms, and as president of a regional bank. Also, he served as management professor at a major state university.

Jack has undergraduate degrees in electrical engineering, physics, and mathematics; a master's degree in Decision Sciences from Georgia State University; and a Ph.D. in Human Resource Management from the University of Alabama. He has served on the boards of several private businesses, nonprofits, and associations, including the American Society for Training and Development, the National Management Association, and the International Society for Performance Improvement, where he served as president (2012-2013).

ROI Certification is designed for individuals who need the skills to conduct impact and ROI studies. During the three-day, in-person ROI Certification session, participants will:

- Engage in sessions to learn about the ROI Methodology and how it is applicable to their work.
- Participate in discussions, exercises, and activities to increase content knowledge and retention.
- Plan an ROI study by completing a data collection and ROI analysis plan.
- Discuss potential barriers and enablers to success and identify solutions.
- Participate in an executive briefing to see how to deliver results to key stakeholders.
- Access the ROI Institute Academy Library for content, materials, resources, templates, and tools.

Day One

- Expectations/Objectives
- Certification Requirements
- Start with Why: Business Alignment
- Make it Feasible: Selecting the Solution
- Expect Success
- Developing Objectives at all Levels
- Data Collection Methods
- Data Collection Plan
- Guiding Principles
- Homework Assignment (ROI Project Planning)

Day Two

- Isolating the Effects of Programs
- Converting Data/Measures to Money
- Costs/ROI
- Intangible Benefits
- Optimize Results
- Homework Assignment (ROI Project Planning)

Day Three

- Communication of Results
- Implementation of the ROI Methodology
- ROI Project Plan Presentations
- ROI Quiz
- Next Steps

Note: This agenda may be modified as needed for participants.