Practical Application of ROI Methodology: Not Just for Evaluators

Participant Resource Packet

Practical tools for identifying, measuring, and communicating the value of grant-funded initiatives.

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Planning for Impact from the Start: *Connecting Activities, Intended Outcomes, Evidence, and Reporting*: Strong impact reporting begins during project planning. Connecting each activity to an intended outcome, evidence source, reporting schedule, and timeline creates a structure for monitoring progress throughout the life of a grant.

Mid-Year Project Performance and Evaluation

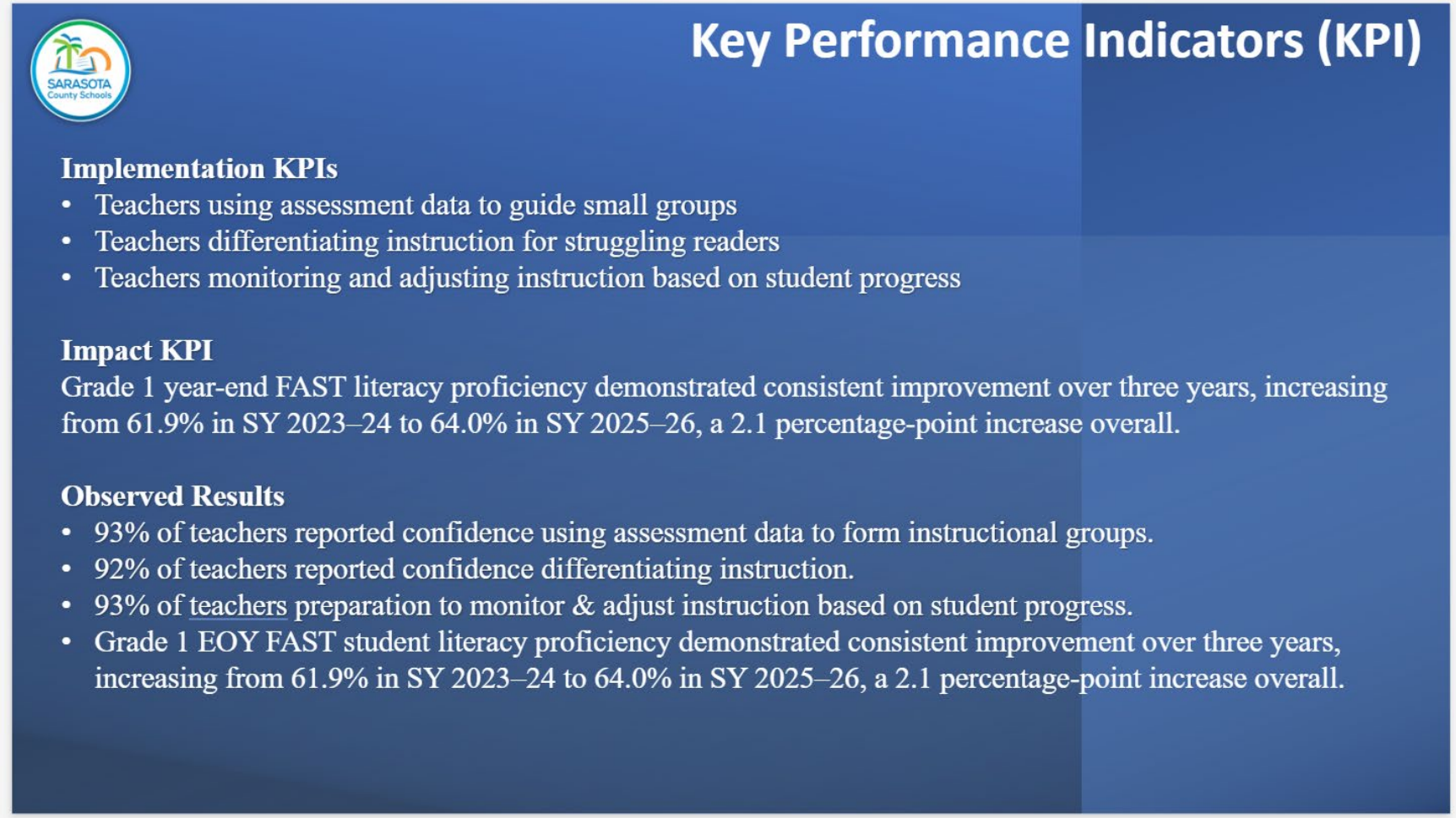
Activity	Intended Outcome	Evidence of Impact	Mid-Year Reporting Progress	Timeline	Notes / Links
Activity: Literacy PL **Audience:** Current cohort of participants by grade level: Kindergarten teachers: 5	100% of PL participants will collectively contribute to 5% increase in the average SCS K-2 foundational reading scores as evidenced by SY 2024-25 PM1 to PM3 STAR Early Literacy/Reading and/or other district approved literacy assessment data as compared to the baseline data of SY 2024-25.	The Program Specialist (POC) will collect participating students STAR Early Literacy/Reading and district approved literacy assessment data for SY 2024-25 for PM1, PM2, and PM3.	These results indicate changes from district approved literacy assessments from PM1 to PM2 for SY 2024-25 in the students supported by classroom teachers being trained in the Literacy PL **Kindergarten**: (73 students' total; 15 are students with disabilities) In the beginning of year, 10% of Kindergarteners met grade level expectations for the beginning of the year in Phonemic Awareness skills. In the middle of the year, 75% of Kindergarteners met grade level expectations for the middle of the year in Phonemic Awareness skills. 81% of participating Kindergarteners made positive growth from PM1 to PM2 in Phonemic Awareness.	**Start:** 8/2024 **End:** 5/2025 **Frequency:** PM1 (BOY) PM2 (MOY) PM3 (EOY) **Final Reporting Due:** 6/2025 Literacy Professional Learning Timeline	Photos

Reporting Results with Context: *Moving From Progress Monitoring to Final Reporting* Final reporting should communicate what the evidence shows, even when results are mixed or unexpected. Providing appropriate context helps stakeholders interpret the findings accurately while identifying questions and considerations for future implementation.

Final Project Performance and Evaluation

Activity	Intended Outcome	Evidence of Impact	Final Reporting Progress
Activity: Literacy PL **Audience:** Current cohort of participants by grade level: Kindergarten teachers: 5	100% of PL participants will collectively contribute to 5% increase in the average SCS K-2 foundational reading scores as evidenced by SY 2024-25 PM1 to PM3 STAR Early Literacy/Reading and/or other district approved literacy assessment data as compared to the baseline data of SY 2024-25.	Evidence of Impact: The Program Specialist (POC) will collect participating students STAR Early Literacy/Reading and district approved literacy assessment data for SY 2024-25 for PM1, PM2, and PM3.	These results indicate changes from district approved literacy assessments from PM1or PM2 to PM3 for SY 2024-25 in the students supported by classroom teachers being trained in Literacy PL. **Kindergarten:** (148 students' total; 32 students with disabilities.) In the middle of the year, 87% of Kindergartners met grade-level expectations in phonemic awareness skills. At the end of the year, 59% of Kindergartners met grade-level expectations in phonemic awareness skills. **Grade level expectations increase in complexity between progress monitoring periods* ** This data may reflect a lag in mastery of more advanced phonemic awareness skills, not a loss of prior learning.*

Choosing Measures That Matter: *Using KPIs to Track Implementation and Impact.* KPIs help turn broad project goals into specific measures that can be monitored and reported. Using both implementation and impact indicators can show not only whether the work is being carried out, but also whether broader outcomes are moving in the intended direction.



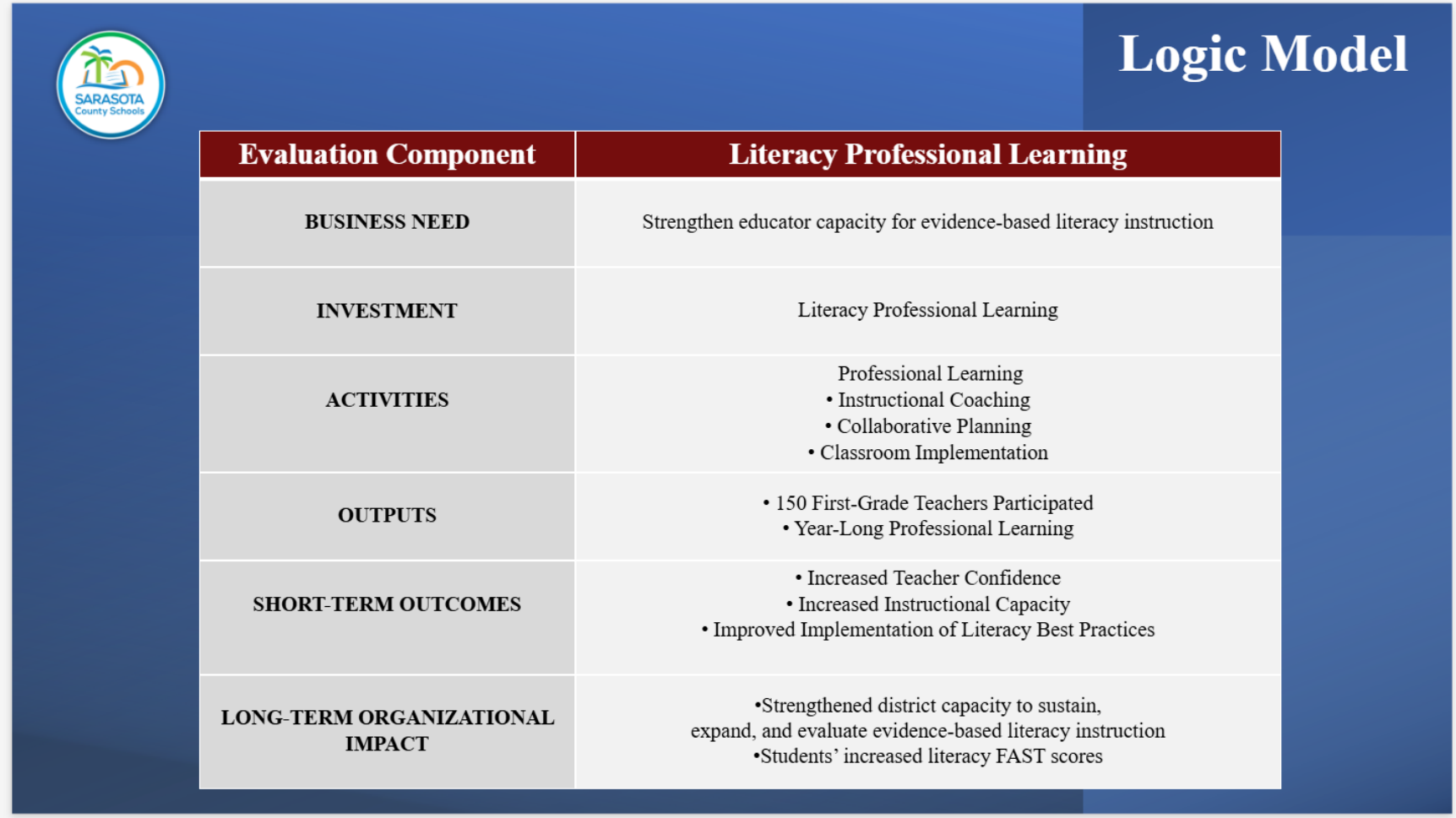
The Five Levels of Evaluation

Evaluation Design

The Literacy PL was evaluated using the ROI Institute's Five-Level Evaluation Framework. Programs are evaluated not only by what participants learn, but by the value they create for the organization. Our focus is measuring organizational value through systematic evaluation.

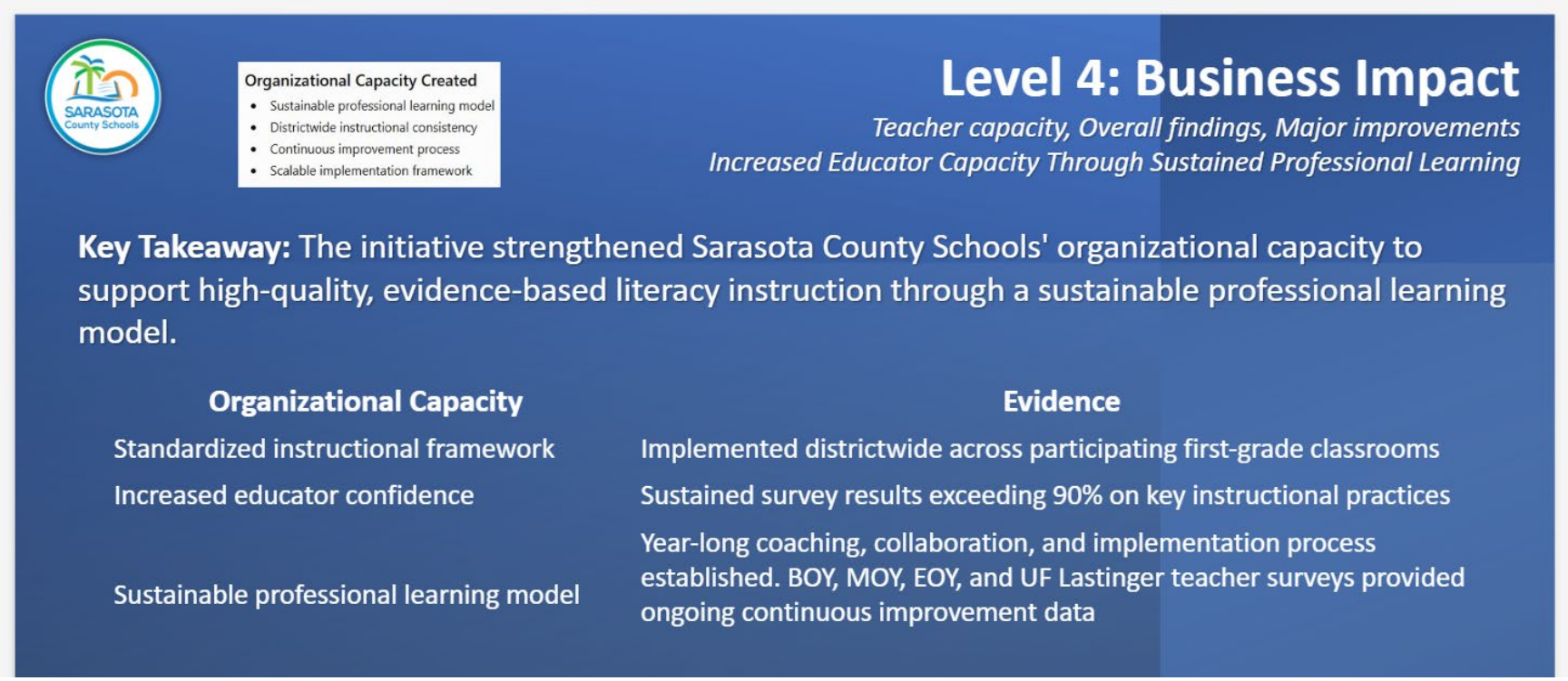
ROI Level	Evaluation Measure	Data Source
1	Teacher satisfaction with professional learning (Reaction & Planned Action)	Teacher Reflection Survey
2	Teacher confidence and knowledge (Learning) increased educator capacity	BOY, MOY & EOY SCS Teacher Surveys
3	Classroom implementation of Literacy best practices (Application & Implementation)	Admin evaluation tools, checklists, interventionists and coach's implementation surveys
4	Student literacy proficiency	FAST literacy scores
5	Organizational value and ROI (Return on Investment)	Cost Analysis & Organizational Value

The Logic Model



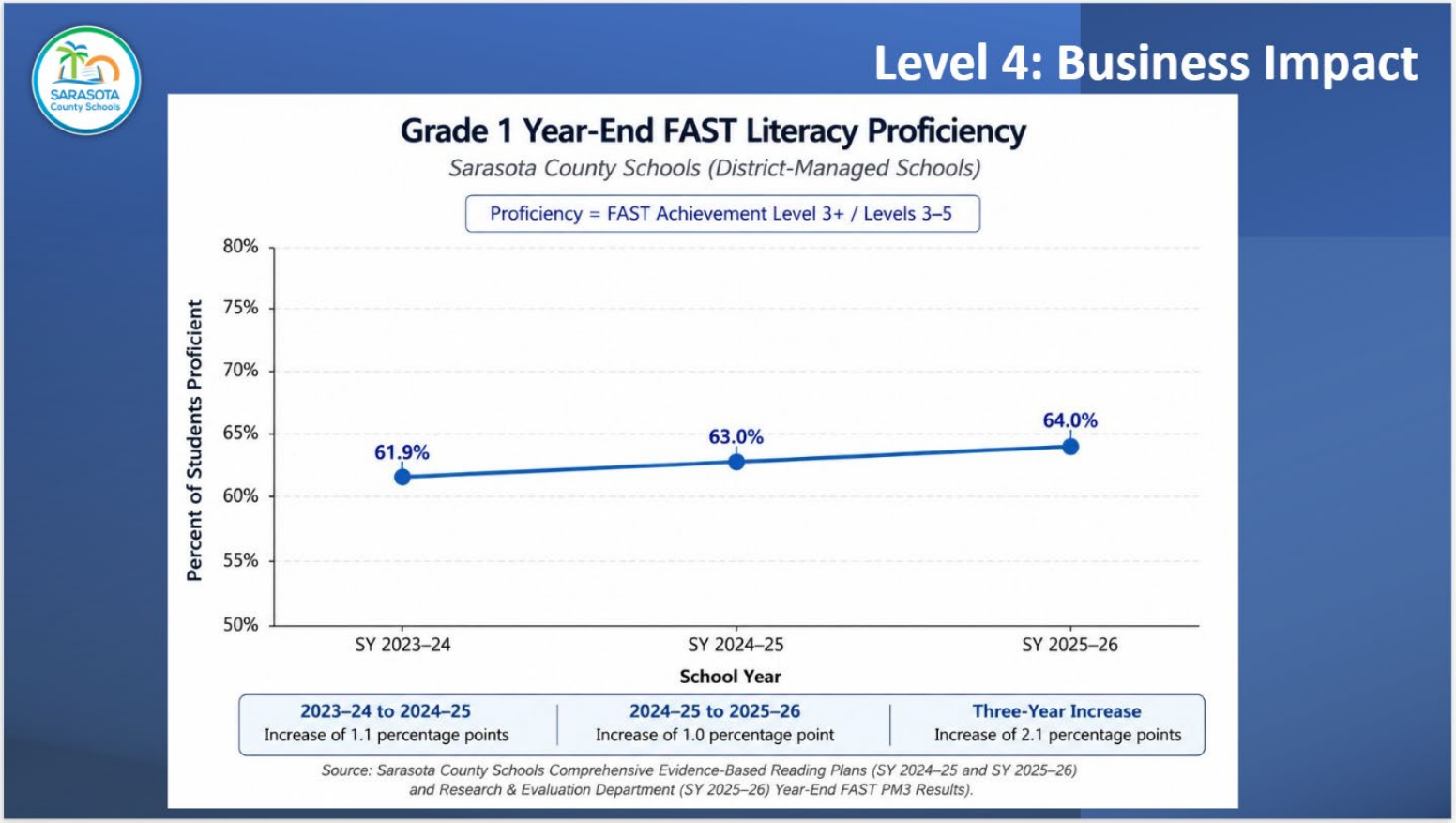
Evaluation Component	Literacy Professional Learning
BUSINESS NEED	Strengthen educator capacity for evidence-based literacy instruction
INVESTMENT	Literacy Professional Learning
ACTIVITIES	Professional Learning • Instructional Coaching • Collaborative Planning • Classroom Implementation
OUTPUTS	• 150 First-Grade Teachers Participated • Year-Long Professional Learning
SHORT-TERM OUTCOMES	• Increased Teacher Confidence • Increased Instructional Capacity • Improved Implementation of Literacy Best Practices
LONG-TERM ORGANIZATIONAL IMPACT	•Strengthened district capacity to sustain, expand, and evaluate evidence-based literacy instruction •Students' increased literacy FAST scores

Looking Beyond Individual Outcomes: *Recognizing Organizational Capacity as an Outcome.* Impact can extend beyond individual participant results. This example shows how evidence from implementation, educator feedback, and ongoing professional learning can be viewed together to identify broader changes in organizational capacity and sustainability.



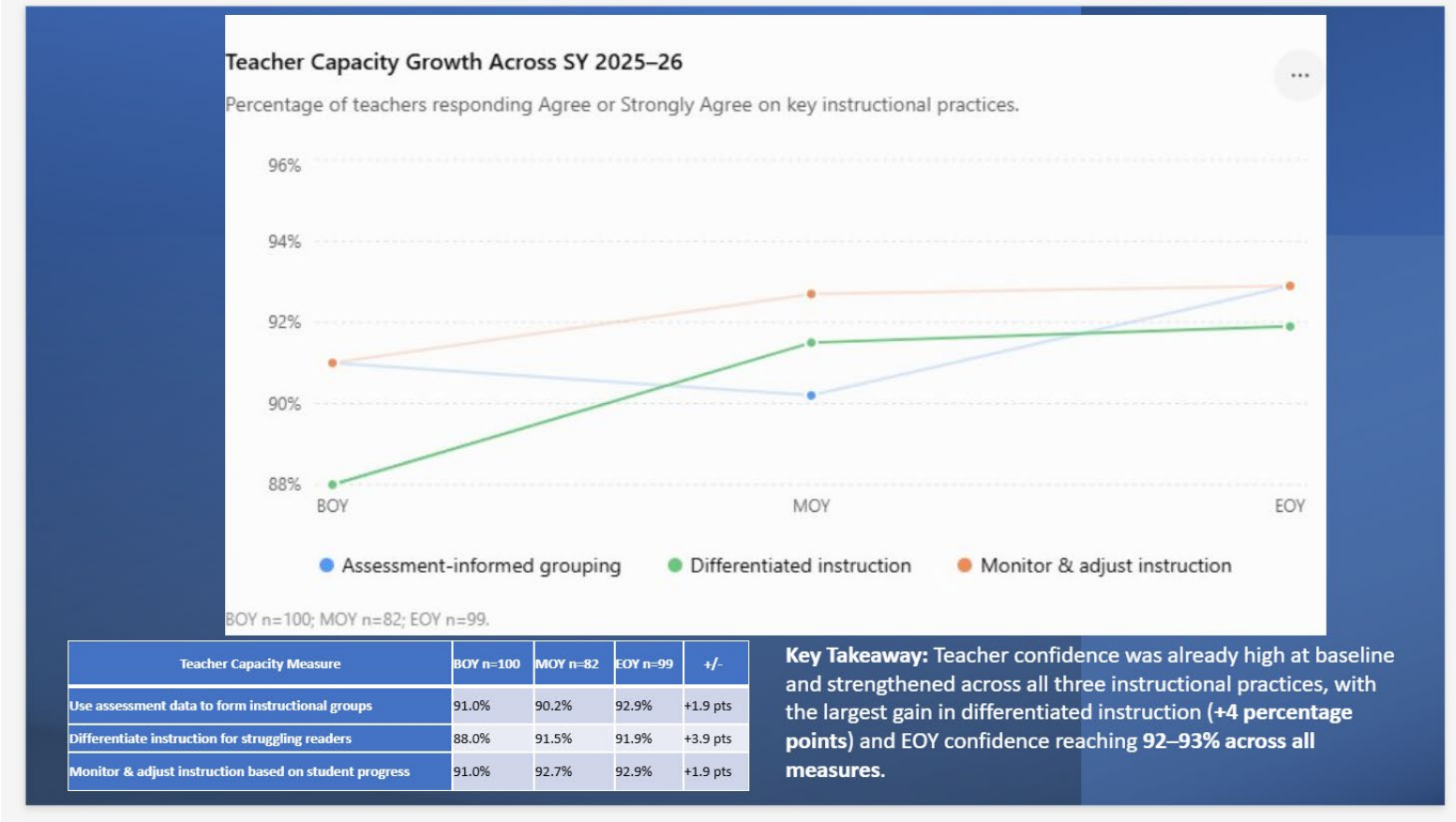
Connecting Program Outcomes to Organizational Goals

Looking Beyond Immediate Program Results: Impact reporting can connect program-level outcomes to broader organizational measures already being tracked. Looking at longer-term trends can help provide context for how an initiative aligns with and may contribute to larger organizational goals.



Looking at Change Over Time

Using Trend Data to Strengthen Impact Reporting: A single data point provides a snapshot, while multiple data points can show direction and change over time. Looking across baseline, midyear, and end-of-year results can help identify where progress occurred, where results remained stable, and where additional attention may be needed.



Teacher Capacity Measure	BOY n=100	MOY n=82	EOY n=99	+/-
Use assessment data to form instructional groups	91.0%	90.2%	92.9%	+1.9 pts
Differentiate instruction for struggling readers	88.0%	91.5%	91.9%	+3.9 pts
Monitor & adjust instruction based on student progress	91.0%	92.7%	92.9%	+1.9 pts

Key Takeaway: Teacher confidence was already high at baseline and strengthened across all three instructional practices, with the largest gain in differentiated instruction (**+4 percentage points**) and EOY confidence reaching **92–93% across all measures.**

The Impact Evidence Inventory

What Data Do You Already Have?

Before creating new measures, look at the evidence you already collect. Use this checklist to identify existing data that can help demonstrate participation, learning, application, impact, and qualitative value.

Participation & Reach

☐ Attendance
☐ Number served
☐ Demographics/populations reached
☐ Completion rates
☐ Dosage/frequency

Learning & Capacity

☐ Knowledge
☐ Skills
☐ Confidence
☐ Preparedness
☐ Understanding

Application & Implementation

☐ Behavior/practice change
☐ Implementation/fidelity
☐ Use of tools/resources
☐ Observations
☐ Follow-up surveys

Impact

☐ Student/participant outcomes
☐ Organizational performance
☐ Efficiency
☐ Quality
☐ Retention
☐ Achievement/performance indicators

Qualitative Evidence

☐ Open-ended survey responses
☐ Interviews/focus groups
☐ Testimonials
☐ Observations
☐ Success stories
☐ Stakeholder feedback

Measuring What Matters: Educator Confidence

Not every meaningful outcome has a dollar value. Survey data can provide measurable evidence of intangible outcomes such as confidence, knowledge, and preparedness—helping demonstrate how an investment may be strengthening educator capacity.

Table 3
Educator Confidence Following Professional Learning (n = 99)

Survey Measure	Agree or Strongly Agree
I feel confident planning and organizing effective small-group lessons.	**93%**
I have a strong understanding of how to structure instruction to meet diverse student needs.	**91%**
I can effectively use assessment data to guide the formation of instructional groups.	**93%**
I feel confident differentiating instruction for struggling readers.	**92%**
I believe small-group instruction positively impacts student learning.	**90%**
I feel prepared to monitor and adjust instruction based on student progress.	**93%**

Source: Sarasota County Schools End-of-Year Teacher Survey (2025-2026).

Adding the Story Behind the Numbers

Using Qualitative Evidence to Show Impact

Participant voice can help explain how and why change is occurring. Reflections, open-ended responses, and testimonials can reveal changes in understanding, intended practice, and organizational capacity that may not be fully captured by numbers alone.

Educators also emphasized that the professional learning corrected misconceptions and strengthened their understanding of dyslexia as a neurological difference rather than a reflection of student ability. Many participants described leaving the training with increased confidence in recognizing early indicators of reading difficulty and implementing instructional practices that support all learners.

One educator reflected,

> *"I am already thinking of students that are now on my radar."*

Another participant shared,

> *"I plan to apply this to my small-group instruction. I will make my instruction more explicit, structured, and scaffolded."*

These investments expanded Sarasota County Schools' capacity to identify students earlier, respond more effectively through evidence-based instruction, and build a growing network of educators with specialized expertise in structured literacy and dyslexia. By combining advanced certification opportunities with accessible districtwide professional learning, the Strauss Literacy Initiative established a sustainable model for strengthening educator knowledge while improving instructional support for students demonstrating characteristics associated with reading difficulties.

Build Your Impact Story

Connecting Investment, Evidence, and Action

Use this template to turn program or grant information into a clear story of impact. Connect why the investment was made, who it reached, what the evidence shows, and what you learned to identify a meaningful next step. This takes you from reporting what we did to explaining what it meant.

We invested in

Because

The initiative reached

Evidence showed

Participants/stakeholders also reported

Looking at Value from Different Angles

Value can show up in different ways. Looking across financial, performance, implementation, and qualitative evidence can provide a more complete picture of what changed as a result of an initiative.

Potential Outcome	How Could I Capture It?	How Could I Report It?
Time saved	Staff records/feedback	Efficiency outcome
Reduced costs	Budget/expenditure data	Cost-related outcome
Increased productivity	Performance/operational data	Performance outcome
Teacher confidence	Survey data	Capacity outcome
Leadership capacity	Surveys/implementation evidence	Organizational capacity
Student belonging	Student surveys/feedback	Participant outcome
Collaboration	Surveys/observations	Implementation outcome
Stakeholder trust	Surveys/feedback	Stakeholder outcome
Improved instructional practice	Surveys/observations	Practice/implementation outcome

Notes