

ROI Analysis of the UNICON Conference

Dan McGurrin, UNC Kenan-Flagler



UNICON
Spring 2004 CONFERENCE

ROI: Measuring Value in
Executive
Development

GOIZUETA
BUSINESS SCHOOL
EMORY



UNC
KENAN-FLAGLER
BUSINESS SCHOOL

April 18-20, 2004 • Atlanta, Georgia

Session Objectives

- Outline Conference Objectives
- Provide Feedback from Surveys
- Explain Conference ROI Process

Conference Goals

Objective: The best UNICON conference ever held

Conference Theme: Understanding ROI of executive development activities to enable Exec Ed providers to design and deliver services/programs of optimal value to their clients

Desired Outcomes:

- Increased awareness of the best current thinking on ROI in executive education
- Improved understanding of the fundamental metrics/concepts for determining ROI in this context
- Expanded thinking on ROI in Exec Ed by applying knowledge of ROI to a specific situation (problem)
- Established the connections to how an enhanced understanding and application of ROI helps us to perform our work at a higher level of quality and value

Conference Learning Objectives

At the end of the 2004 UNICON Spring Conference, participants will:

- **Understand the importance of ROI analysis in executive development activities**
 - Justifying resource allocation from the client's perspective
 - Impact on program design and delivery
 - Clarification on objectives and intended outcomes for all parties

Conference Learning Objectives

At the end of the 2004 UNICON Spring Conference, participants will:

- **Enhance their understanding of how to conduct ROI analyses/program assessments**
 - Analytical frameworks and research methodologies
 - Current applications of ROI analysis in both open enrollment and custom programs
 - Apply knowledge and experience through action learning
 - Experience the ROI approach through Conference participation

Conference Learning Objectives

At the end of the 2004 UNICON Spring Conference, participants will:

- **Learn to incorporate concepts and tools in managing their portfolio of executive development programs**
 - Integration with client interactions and feedback to senior executives
 - Organizational and infrastructure changes to support ROI
 - Designing and delivering programs that optimize ROI

Our expectation is that at the end of the conference you will achieve these learning objectives, and be better prepared to incorporate effective ROI analytical processes in your activities.

Level of Expertise

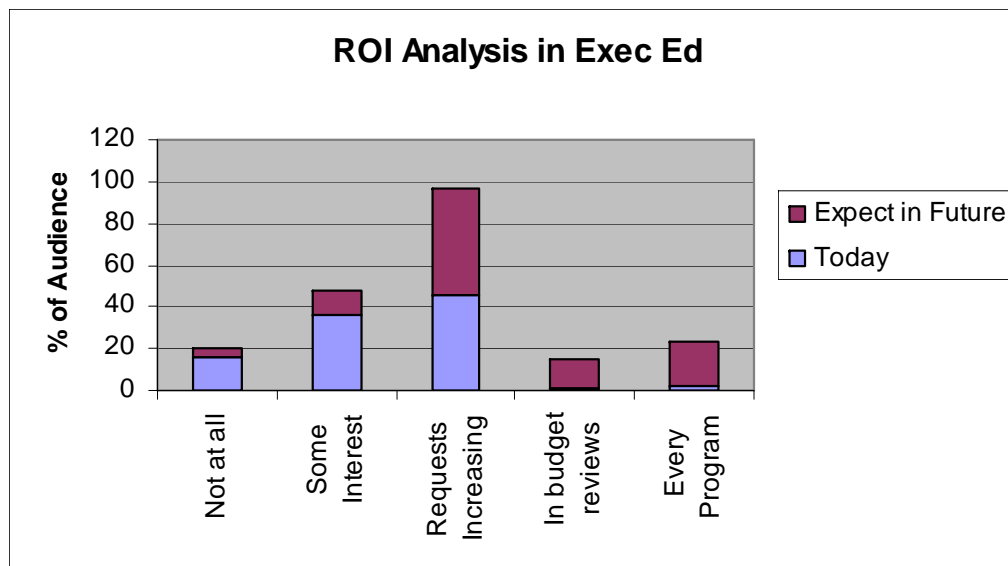
Your Knowledge/Experience in the following areas:

- Kirkpatrick's Four Levels of Evaluation ([2.30](#))
- Recent Research on ROI Analysis ([2.24](#))
- How to make ROI Calculations ([2.80](#))
- A systematic process to Program Assessment (2.79)
- Conducting ROI analysis for executive education programs ([2.38](#))
- Presenting to clients on determining value for their dollars spent on executive development (2.55)

1- No knowledge/exp
2- Awareness
3- Understanding
4- Practitioner
5- Expert

ROI Analysis in Executive Education

- Today – mostly some interest and increasing requests
- Expect in Future – requests to further increase, and more expectation of use in budget reviews and program evaluations



Conference Concerns

Importance of topic

- Value today of ROI, considering the improving conditions
- How is ROI being used in companies (is it purely academic?)

Presentation Material

- Not too general, get into specifics; be strategic. Theory and practices, not just war stories.
- Equal balance of discussion on OE and Custom

Learning-Work Link

- Make sure there is take away value and direction on how to use in own organization
- Ability to tie ROI analysis to program objectives, separate from other factors

Targeted to Audience

- Openness of group to discuss topic (real experience with tools)
- Some people have little ROI/Assessment knowledge; don't want to be lost or not contribute to discussions

ROI Analysis of Conference

$$\text{ROI (\%)} = \frac{\text{Net Program Benefits}^*}{\text{Program Costs}} \times 100$$

* Net Benefits = Program Benefits – Program Costs

Your ROI Analysis

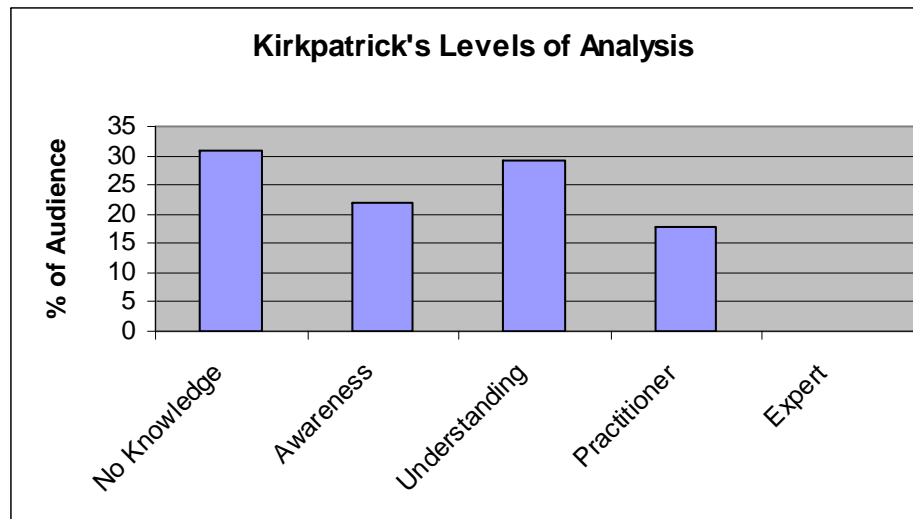
$$\text{ROI (\%)} = \frac{\text{Net Program Benefits}}{\text{Program Costs}} \times 100$$

Q & A

Level of Expertise

Your Knowledge/Experience in the following areas:

- Kirkpatrick's Four Levels of Evaluation (2.30)



- 1- No knowledge/exp
- 2- Awareness
- 3- Understanding
- 4- Practitioner
- 5- Expert

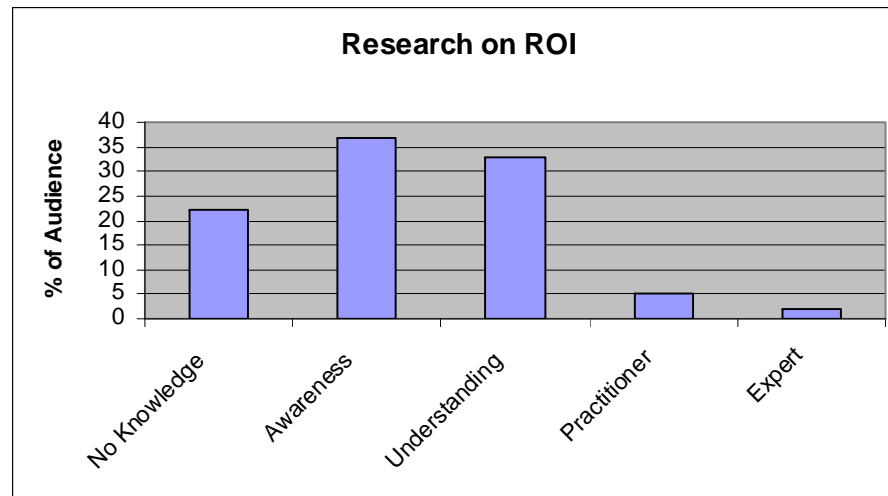
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Level of Expertise

Your Knowledge/Experience in the following areas:

- Recent Research on ROI Analysis (2.24)

1- No knowledge/exp
2- Awareness
3- Understanding
4- Practitioner
5- Expert



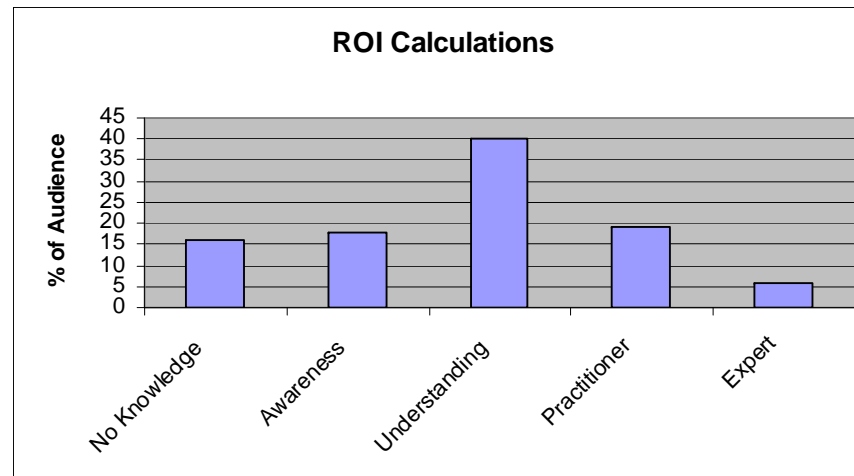
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Level of Expertise

Your Knowledge/Experience in the following areas:

- How to make ROI Calculations (2.80)

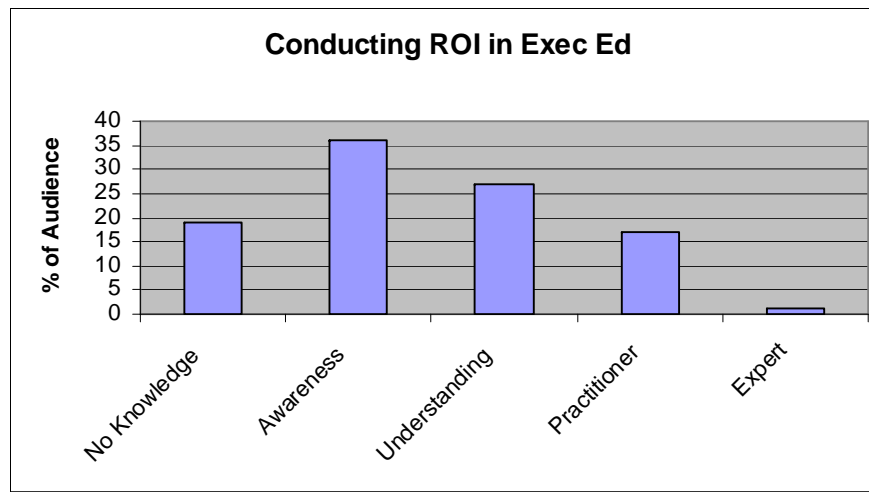
1- No knowledge/exp
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Level of Expertise

Your Knowledge/Experience in the following areas:



1- No knowledge/exp
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- Conducting ROI analysis for executive education programs (2.38)

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Conference Benefits

Evaluating Conference Outcomes

- **Established the connections to how an enhanced understanding and application of ROI helps us to perform our work at a higher level of quality and value**
 - Reaction: Conference surveys confirm recognition of ROI analysis value in Exec ED
 - Learning: Retained knowledge/commitment post-conference
 - Behavior: ROI analysis being applied to programs
 - Results: ROI analysis impacts value of work
 - Program impacts clearly identified
 - Program designs more effectively tied to business objectives
 - New contracts/funding due to ROI analysis

[Return to formula](#)

Conference Costs

- Time invested by Emory University and UNC Kenan-Flagler employees
 - Time x % of salary
- UNICON investments
 - \$ funding from UNICON

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Net Program Benefits

- Identify your Conference Objectives
 - Take 5 minutes and write down what you expect to achieve, based on the stated Conference Objectives
 - Improved program designs and analysis
 - Improved processes for reporting training impacts
 - Improved resource and budget planning for 2004-05
- What *measurable* outcomes will demonstrate achieving these objectives?
 - New contracts/registrations with companies who value ROI analysis
 - Increased budget allocation from corporate/dean

Program Costs

- Conference Fee
- Travel Expenses (flight, rental car, parking, etc)
- Meals (outside of conference)
- Other costs to consider
 - Personal expenses (day care, stressed out spouse)
 - Opportunity costs

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