



# Return On Investment - Let's Talk



**ROI  
Let's Talk Team**



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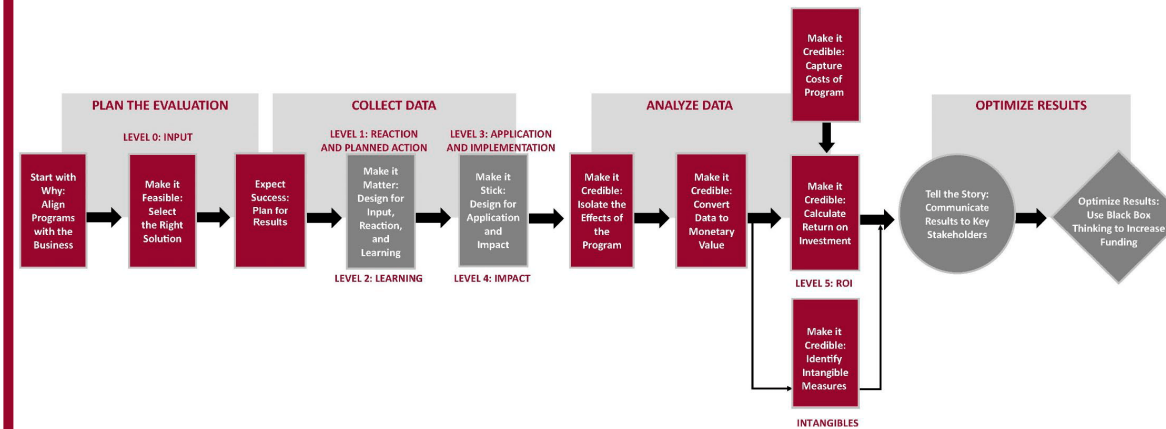
Providing a world-class education for all students

Kurt S. Browning, Superintendent of Schools

# ROI Methodology Model

## ROI Methodology Model

The 12 steps in the ROI Methodology are logical and systematic, representing an enhanced logic model.

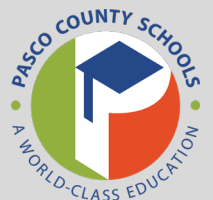


# Plan The Evaluation

## Start with the why: Align programs with the business

There was no formal method of tracking how often a parent had called and/or emailed on an issue, if they called/emailed multiple staff, or how many times they were transferred. We looked for a platform that would assist with the following:

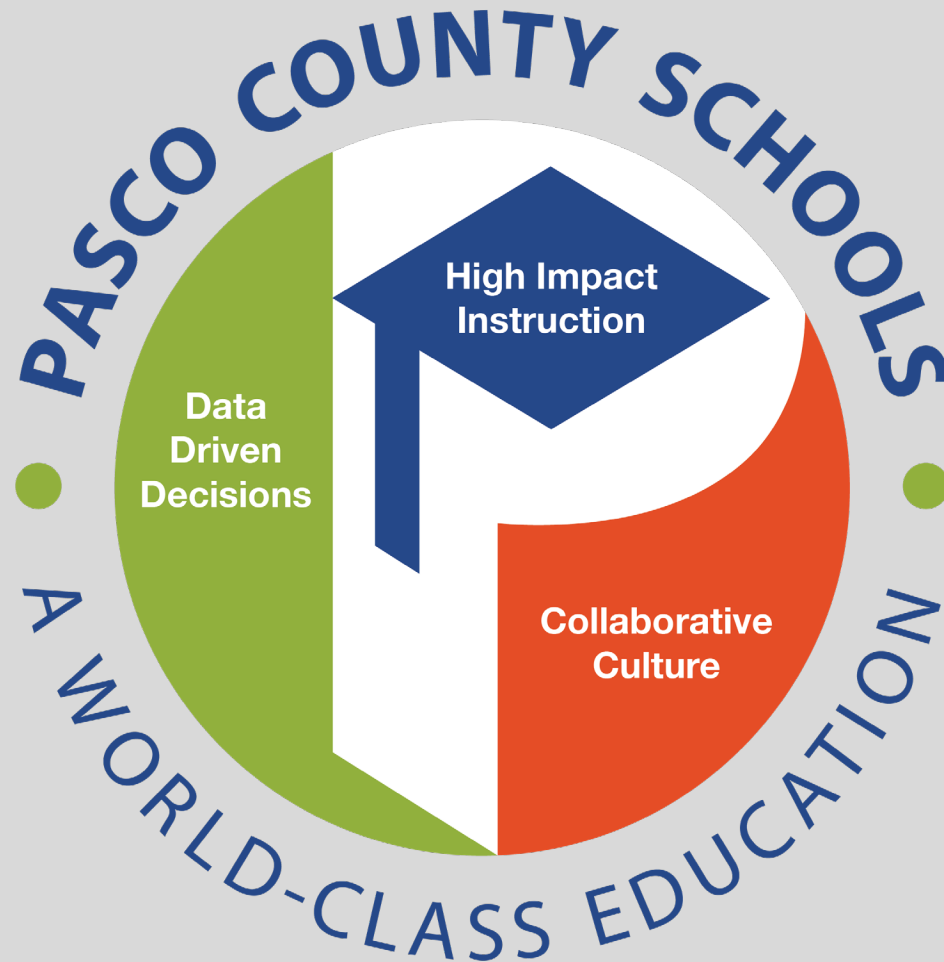
- Have a unified inbox that streamlines internal and external communications.
- Helping staff listen to community feedback and respond quickly to incoming questions.
- A way to track real-time data and predictive analytics to show key metrics and insights, including trending issues, district response times, document district responses, and customer satisfaction.
- Tie to Mission - World-Class Education
- Aligns with our Community Engagement Strive for '25 Initiative.
- Giving the community a user-friendly way to contact the School District.



# Taking Success to the Next Level

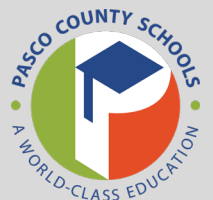
## Mission

We exist to provide a world class education for all students.



## Vision

All our students achieving success in college, career, and life.





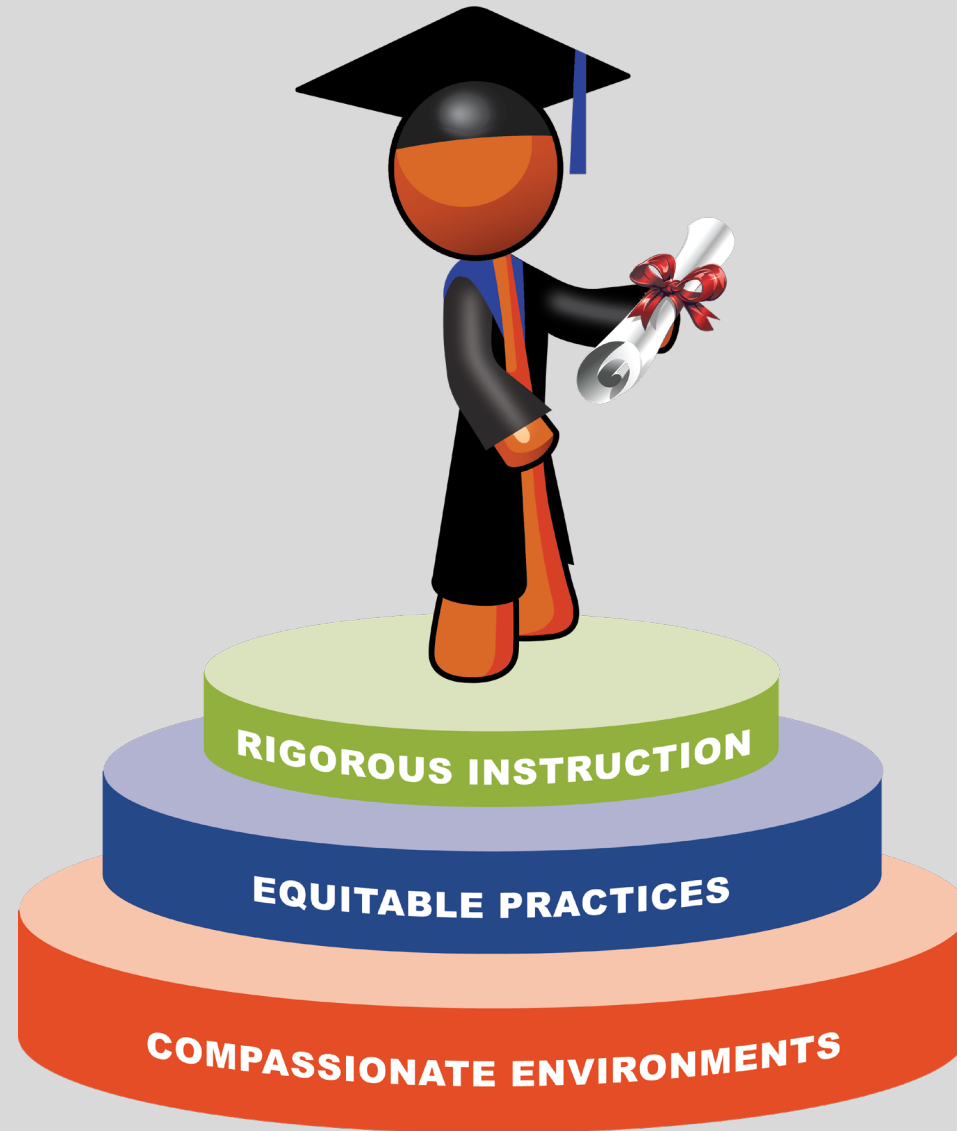
A photograph of a classroom scene. A female teacher with long blonde hair is sitting on a wooden desk, smiling at the camera. She is wearing a light blue top and dark blue polka-dot pants. In the foreground, several students are seated at desks, with their hands raised in the air, indicating an interactive or active learning environment. The background features a green chalkboard with a world map hanging on it, and a wooden bookshelf filled with books on the left. The overall atmosphere is bright and positive.

# Pasco's Theory of Action

If we create a unifying vision of instructional excellence for our schools, **define** the behaviors we believe will lead to success in schools, and **provide** the necessary supports from our teams, **then**, staff efficacy and student achievement will increase.

# Our Responsibility!

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# Plan The Evaluation

## Make it feasible: Select the right solution

### Why Let's Talk?

- Unified inbox that streamlined internal and external communications.
- Multiple methods of communication are supported, such as phone calls, text messages, and email. Also, multiple platforms are supported, such as computers and mobile devices.
- The Let's Talk system is user-friendly. It takes very little instruction on how to use it. The system itself also offers guidance and training.
- Reports can be generated by district, department, school, or topic.
- Customer service rating is developed within the program and provides real-time updates.
- Tracks and ensures responses.
- Customizable features tailored to Pasco County School needs at no additional cost.
- Professional development and training available in multiple formats and at convenient times at no additional cost.



# Plan The Evaluation

## Expect Success: Plan for results

- Provide all stakeholders an accessible way to ask questions, report concerns, and provide feedback 24/7 from any device – regardless of their preferred method of communication or level of technology access.
- Strong customer service
  - Customer Service Score from 0-10 (10 being the best.)
  - Track Positive & Negative Experience (Users provide a thumbs up or down. Raw number to the total experience that has been rated.)
  - Dialogue Age
- Initial response time expectation: within 24 business hours.
- Parents - Initiate communication using the Let's Talk system.
- Staff - Prompt and accurate responses. Canned responses are an option for hot topics.

# Collect Data

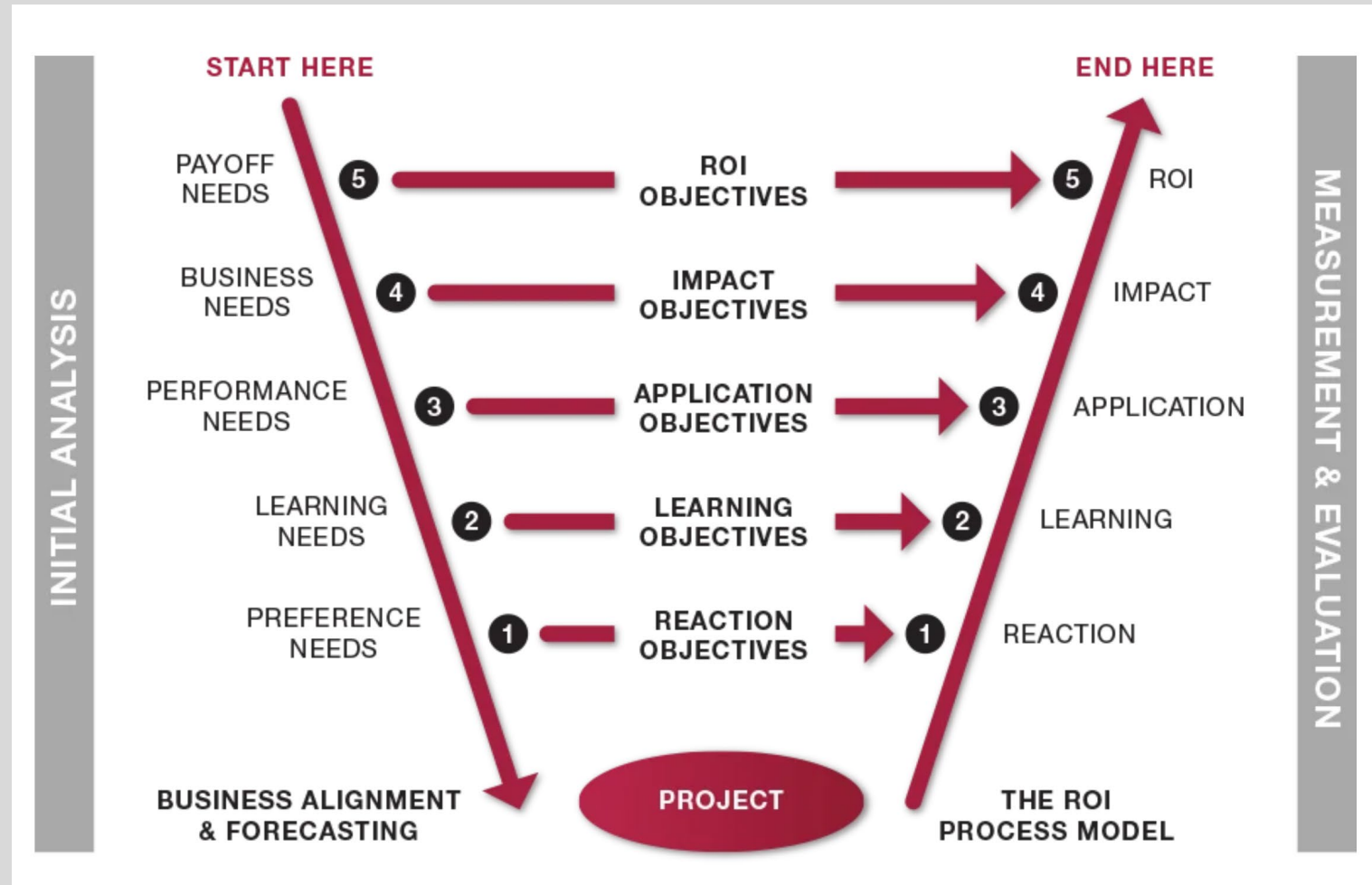
## Guiding Principals

### Guiding Principles

1. When a higher-level evaluation is conducted, data must be collected at lower levels.
2. When an evaluation is planned for a higher level, the previous level of evaluation does not have to be comprehensive.
3. When collecting and analyzing data, use only the most credible source.
4. When analyzing data, choose the most conservative among the alternatives.
5. At least one method must be used to isolate the effects of the solution.
6. If no improvement data are available for a population or from a specific source, it is assumed that little or no improvement has occurred.
7. Estimates of improvements should be adjusted (discounted) for the potential error of the estimate.
8. Extreme data items and unsupported claims should not be used in ROI calculations.
9. Only the first year of benefits (annual) should be used in the ROI analysis of short-term solutions.
10. Costs of the solution should be fully loaded for ROI analysis.
11. Intangible measures are defined as measures that are purposely not converted to monetary values.
12. The results from the ROI Methodology must be communicated to all key stakeholders.

# Collect Data

## The Alignment Process



# Collect Data

## Data Collection Plan

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### DATA COLLECTION PLAN

PURPOSE OF THIS EVALUATION: Let's Talk Program Evaluation #1,2 Guiding Principle/s \_\_\_\_\_  
 PROGRAM/PROJECT: Let's Talk RESPONSIBILITY: ROI Evaluation Team Cohort #3 DATE: November 9, 2023

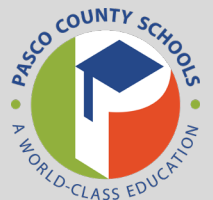
Level	Broad Program Objective(s)	Measures	Data Collection Method / Instruments	Data Sources	Timing	Responsibilities
1	<b>REACTION &amp; PLANNED ACTION</b> <ul style="list-style-type: none"> <li>Parents                             <ul style="list-style-type: none"> <li>Important to my child</li> <li>Recommend to others</li> </ul> </li> <li>Staff                             <ul style="list-style-type: none"> <li>Important to the mission and my job</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Number of open and closed dialogues</li> <li>Point Scale</li> </ul>	<ul style="list-style-type: none"> <li>Tools/Reports embedded in Let's Talk Program</li> <li>Survey using Point Scale</li> </ul>	<ul style="list-style-type: none"> <li>Let's Talk Records</li> <li>Point Scale Responses</li> </ul>	<ul style="list-style-type: none"> <li>October 2023</li> </ul>	<ul style="list-style-type: none"> <li>ROI Evaluation Team Cohort 3</li> </ul>
2	<b>LEARNING &amp; CONFIDENCE</b> <ul style="list-style-type: none"> <li>Parents                             <ul style="list-style-type: none"> <li>I know how to access the system if needed</li> </ul> </li> <li>Staff                             <ul style="list-style-type: none"> <li>I know how to respond/close dialogues and appropriately direct dialogues when need to the correct party</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Survey</li> </ul>	<ul style="list-style-type: none"> <li>Survey responses</li> </ul>	<ul style="list-style-type: none"> <li>Let's Talk Records</li> <li>Survey Responses</li> </ul>	<ul style="list-style-type: none"> <li>October 2023</li> </ul>	<ul style="list-style-type: none"> <li>ROI Evaluation Team Cohort 3</li> </ul>
3	<b>APPLICATION &amp; IMPLEMENTATION</b> <ul style="list-style-type: none"> <li>Parents                             <ul style="list-style-type: none"> <li>Complete a dialogue when needed</li> </ul> </li> <li>Staff                             <ul style="list-style-type: none"> <li>Answer/Route/Close received dialogues</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Parents                             <ul style="list-style-type: none"> <li>Number of dialogues created</li> </ul> </li> <li>Staff                             <ul style="list-style-type: none"> <li>Number of dialogues appropriately routed and closed</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Performance Monitoring</li> </ul>	<ul style="list-style-type: none"> <li>Let's Talk Records</li> </ul>	<ul style="list-style-type: none"> <li>October-November 2023</li> </ul>	<ul style="list-style-type: none"> <li>ROI Evaluation Team Cohort 3</li> </ul>

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4	<b>BUSINESS IMPACT</b> <ul style="list-style-type: none"> <li>Parents                             <ul style="list-style-type: none"> <li>Time savings and increased customer satisfaction</li> </ul> </li> <li>Staff                             <ul style="list-style-type: none"> <li>Reduction in the duplication if work and misrouted dialogues</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Parents                             <ul style="list-style-type: none"> <li>Number of positive reactions</li> </ul> </li> <li>Staff                             <ul style="list-style-type: none"> <li>Estimates from credible sources (Leadership)</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Performance monitoring</li> <li>Thumbs up and thumbs down</li> <li>Estimates from credible sources (Leadership)</li> </ul>	<ul style="list-style-type: none"> <li>Let's Talk Records</li> </ul>	<ul style="list-style-type: none"> <li>October-November 2023</li> </ul>	<ul style="list-style-type: none"> <li>ROI Evaluation Team Cohort 3</li> </ul>
5	ROI Breakeven 0%	<b>Comments:</b> Intangibles such as customer service is very important				





# Collect Data

## Level 1: Reaction and planned action. Make it matter: Design for input, reaction, and learning.

In early 2020, the original plan for rolling out Let's Talk focused on one department implementation at a time with transportation being the first. This focus changed due to the pandemic. To meet the communication needs of all stakeholders, the system was rolled out district-wide in a short 3-month span.

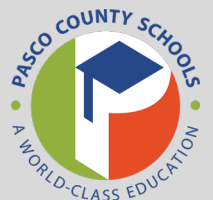
Our primary focus of this ROI evaluation is to measure how the application and implementation of Let's Talk impacted the time staff spent answering calls from the same stakeholders regarding the same topic and increase customer service satisfaction.

Management Expectation/Objective - Preference Needs (Alignment Process - V-model):

- Decrease response rate time
- Increase customer service
- Decrease duplicate staff responses

Level	Broad Program Objective(s)	Measures	Data Collection Method / Instruments	Data Sources	Timing	Responsibilities
1	<b>REACTION &amp; PLANNED ACTION</b> <ul style="list-style-type: none"> <li>• Parents                             <ul style="list-style-type: none"> <li>○ Important to my child</li> <li>○ Recommend to others</li> </ul> </li> <li>• Staff                             <ul style="list-style-type: none"> <li>○ Important to the mission and my job</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Number of open and closed dialogues</li> <li>• Point Scale</li> </ul>	<ul style="list-style-type: none"> <li>• Tools/Reports embedded in Let's Talk Program</li> <li>• Survey using Point Scale</li> </ul>	<ul style="list-style-type: none"> <li>• Let's Talk Records</li> <li>• Point Scale Responses</li> </ul>	<ul style="list-style-type: none"> <li>• October 2023</li> </ul>	<ul style="list-style-type: none"> <li>• ROI Evaluation Team Cohort 3</li> </ul>

Guiding Principle/s: # 1 & 2



# Collect Data

## Level 2: Learning

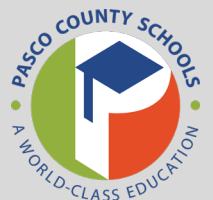
Utilizing the online training tools provided by Let's Talk, staff received instruction on navigating the system and responding to students, parents, and community stakeholder requests. Since the pandemic, the system has grown in utilization, with many students, parents, staff, and community members using the system as the initial form of communication.

Management Expectation/Objective - Learning Needs (Alignment Process - V-model):

- Staff utilizes the resource provided by Let's Talk Program
- Parents/community members had an option to attend a Superintendent Family Forum to gain knowledge of the new Let's Talk Program.
  - Press Releases, website banners and submission boxes announced the Let's Talk Platform from the district level
  - School communication followed the school process (School Messenger, school website banner and Let's Talk box on school website)

Level	Broad Program Objective(s)	Measures	Data Collection Method / Instruments	Data Sources	Timing	Responsibilities
2	LEARNING & CONFIDENCE <ul style="list-style-type: none"> <li>• Parents               <ul style="list-style-type: none"> <li>○ I know how to access the system if needed</li> </ul> </li> <li>• Staff               <ul style="list-style-type: none"> <li>○ I know how to respond/close dialogues and appropriately direct dialogues when need to the correct party</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Survey</li> </ul>	<ul style="list-style-type: none"> <li>• Survey responses</li> </ul>	<ul style="list-style-type: none"> <li>• Let's Talk Records</li> <li>• Survey Responses</li> </ul>	<ul style="list-style-type: none"> <li>• October 2023</li> </ul>	<ul style="list-style-type: none"> <li>• ROI Evaluation Team Cohort 3</li> </ul>

Guiding Principle/s: # 1 & 2



# Collect Data

**Level 3: Application and implementation. Make it stick: Design for application and impact.**

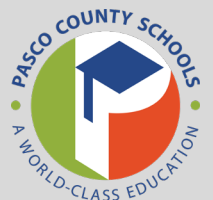
To measure the impact of Let's Talk on reducing redundant calls and maximizing staff time, we measured pre and post call activity using estimates from credible sources such as, management, financial data, and reports from the Let's Talk system.

Management Expectation/Objective Performance Needs (Alignment Process - V-model):

- Staff would respond to a dialogue within 24 hours

Level	Broad Program Objective(s)	Measures	Data Collection Method / Instruments	Data Sources	Timing	Responsibilities
3	<b>APPLICATION &amp; IMPLEMENTATION</b> <ul style="list-style-type: none"> <li>• Parents                             <ul style="list-style-type: none"> <li>◦ Complete a dialogue when needed</li> </ul> </li> <li>• Staff                             <ul style="list-style-type: none"> <li>◦ Answer/Route/Close received dialogues</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Parents                             <ul style="list-style-type: none"> <li>◦ Number of dialogues created</li> </ul> </li> <li>• Staff                             <ul style="list-style-type: none"> <li>◦ Number of dialogues appropriately routed and closed</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Performance Monitoring</li> </ul>	<ul style="list-style-type: none"> <li>• Let's Talk Records</li> </ul>	<ul style="list-style-type: none"> <li>• October-November 2023</li> </ul>	<ul style="list-style-type: none"> <li>• ROI Evaluation Team Cohort 3</li> </ul>

Guiding Principle/s: #1, 2, 3, 5, & 7



# Collect Data

## Level 4: Impact

We split the data collection into two phases to measure application and implementation. The first phase was pre-Let's Talk, where we surveyed management on the estimated number of calls staff received from the same individuals regarding the same topics. We further asked them to provide an estimated amount of time each staff member spent on a call, which staff members were impacted, and finally, a confidence level of their estimation. We then worked with Finance to determine the per-minute cost for each staff level (office assistants, principals, assistant principals, program coordinators/supervisors, directors, and assistant superintendents) impacted. The cost includes both salary and benefits.

The second phase measured the Let's Talk dialogue activity for the 2023 School Year (SY) (July 1, 2022, through June 30, 2023). The activity list was limited to students and parents, as they represented most of the dialogues and are the satisfaction priority in the stakeholder hierarchy.

Management Expectation/Objective - Business Needs (Alignment Process - V-model):

- **Dialogue Age** - 1.1 Overall Good Job and **Unresolved Critical Dialogues** - 0 (Let's Talk Report)
- **Customer satisfaction** - 8.4 Great Service (Let's Talk Report)

Level	Broad Program Objective(s)	Measures	Data Collection Method / Instruments	Data Sources	Timing	Responsibilities
4	<b>BUSINESS IMPACT</b> <ul style="list-style-type: none"> <li>• Parents                             <ul style="list-style-type: none"> <li>○ Time savings and increased customer satisfaction</li> </ul> </li> <li>• Staff                             <ul style="list-style-type: none"> <li>○ Reduction in the duplication of work and misrouted dialogues</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Parents                             <ul style="list-style-type: none"> <li>○ Number of positive reactions</li> </ul> </li> <li>• Staff                             <ul style="list-style-type: none"> <li>○ Estimates from credible sources (Leadership)</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Performance monitoring</li> <li>• Thumbs up and thumbs down</li> <li>• Estimates from credible sources (Leadership)</li> </ul>	<ul style="list-style-type: none"> <li>• Let's Talk Records</li> </ul>	<ul style="list-style-type: none"> <li>• October-November 2023</li> </ul>	<ul style="list-style-type: none"> <li>• ROI Evaluation Team Cohort 3</li> </ul>

Guiding Principle/s: # 1, 2, 3, & 7





# Collect Data

## Level 5: Make it credible: Isolate the effects of the program

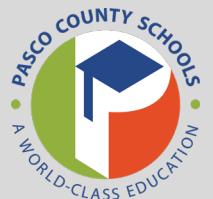
Level 5: ROI Objective

Management Expectations/Objective - Payoff Needs (The Alignment Process - V-model):

- Breakeven

Level	Broad Program Objective(s)	Measures	Data Collection Method / Instruments	Data Sources	Timing	Responsibilities
5	ROI Breakeven 0%	Comments: Intangibles such as customer service is very important				

Guiding Principle/s: #1, 2, 4, 8, & 10



# Benefit-Cost Ratio (BCR) & Return On Investment (ROI) Formulas

$$\text{BCR} = \frac{\text{Program Benefits}}{\text{Program Costs}}$$

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

# Analyze Data

We used an average of the **management estimates** to determine the number of phone attempts, the staff members impacted, and the length of time for each phone attempt.

We then used the reports from Let's Talk to determine the **number of dialogues** received during SY 2023.

Another form of isolating the effects of the program

- Ensuring that the credible estimates from management were solely based on the program's involvement.
  - COVID should not have been a factor in their estimates as it is no longer relevant to the use of the program.

Participant feedback - 8.4 Great Service (Let's Talk Report)

- District Departments and Schools have asked for additional programs be added to Let's Talk

**Guiding Principle/s:** #1, 2, & 5



# Analyze Data

## Make it credible:

### Convert data to monetary value.

Using the cost per minute for each staff level, we converted the time for each to dollars. For example, the average principal cost is \$1.15 per minute, with a 10-minute call costing \$11.50. Adding up the cost for each staff member, we came up with a cost of \$60.50 for six calls from one individual on the same topic, which we will refer to as the "Call Cost".

### Capturing Costs

To determine the "pre" Let's Talk cost, we used the number of dialogues for the SY2023 multiplied by the Call Cost and reduced that result by the average confidence level of 77%, which resulted in \$464,779.

We used the annual, Let's Talk system subscription, a direct cost of \$175,862 to determine the post-Let's Talk cost. In addition, we added an estimated cost for ten minutes of the staff's time answering each dialogue.

Finally, we added the staff cost for the members of the ROI evaluation team which is part of the ROI process to include evaluation costs equaling \$5,000.00.



# Analyze Data

## Calculate Return On Investment

Before Let's Talk, the estimated cost to handle 9,977 single-topic inquiries would have been \$464,779 at a 77% confidence level. With Let's Talk, the cost for handling the same number of single-topic inquiries with all additional costs is \$276,516, resulting in a **BCR of 1.68:1** and an **ROI of 68.1%**

## Identify Intangibles

- Streamlining of internal and external communications.
- The district, schools and/or staff receive direct feedback from the community.
- Quick responses to questions.
- Provide stakeholders an accessible way to ask questions, report concerns, and provide feedback 24/7 from any device — regardless of their preferred method of communication or level of technology access.
- Customer Service measure.
- Track real-time data and predictive analytics to show key metrics and insights, including trending issues, district response times, and customer satisfaction.
- Acts as a staff training tool - by calibrating responses to common questions.
- National and state recognition for community engagement - Published articles.

**Guiding Principal/s: #1, 2, 3, 4 & 11**



# Analyze Data

## Detailed Calculation

Question	Minute Rate	COST PER CALL				MM	HR	MK	MT	AVG
		MM	HR	MK	MT					
Number of people parents reach out to		6	5	6 to 8	7					6
Time of call		10	6	15	10-15					10
Confidence Level		60%	85%	85%	60%					
School:										
Office Assistant	0.45	1	1	1	1	4.50	4.50	4.50	4.50	4.50
Principal	1.15	1	1	1	1	11.50	11.50	11.50	11.50	11.50
Asst Principal	0.95			1	1	-	-	9.50	9.50	-
District:										
Office Assistant	0.45	1	1	1	2	4.50	4.50	4.50	9.00	4.50
Program Coord/Supervisor	1.00	1	1	1	1	10.00	10.00	10.00	10.00	10.00
Asst Superintendents	1.62	1	1	1	1	16.20	-	16.20	16.20	16.20
Directors	1.38	1	1	1	1	13.80	13.80	13.80	13.80	13.80
Office Assistant - Super	0.67			1	1	-	-	6.70	6.70	-
<b>Average Cost Per Minute (ACPM)</b>	<b>0.9588</b>					60.50	44.30	76.70	81.20	60.50
<p><b>Before Let's Talk</b>, each caller would reach out to 6 to 8 staff members in an attempt to resolve their issue. Each call is estimated to last 10 minutes as the caller would replay the various attempts they made to resolve their issue.</p> <p><b>After the Let's Talk implementation</b>, callers are now dialogues, which are routed to the correct staff member. Most dialogues are handled with quick responses, and routine questions are handled with an automated response. We are estimating 10 minutes to handle each dialogue.</p>										
						9,977	9,977	9,977	9,977	9,977
						\$603,609	\$441,981	\$765,236	\$810,132	\$603,609
						60%	85%	85%	60%	77%
						\$362,165	\$375,684	\$650,451	\$486,079	\$464,779
						\$175,862	\$175,862	\$175,862	\$175,862	\$175,862
										\$5,000
						10	10	10	10	10
						95,654	95,654	95,654	95,654	95,654
						<b>271,516</b>	<b>271,516</b>	<b>271,516</b>	<b>271,516</b>	<b>276,516</b>
						1.33	1.38	2.40	1.79	1.68
						33.4%	38.4%	139.6%	79.0%	68.1%
<p><b>Intangibles:</b></p> <ol style="list-style-type: none"> <li>streamlines internal and external communications.</li> <li>Helping staff listen to community feedback</li> <li>Respond quickly to incoming questions.</li> <li>Provide communities an accessible way to ask questions, report concerns, and provide feedback 24-7 from any device — regardless of their preferred method of communication or level of technology access.</li> <li>Track real-time data and predictive analytics to show key metrics and insights, including trending issues, district response times, and customer satisfaction.</li> <li>Staff training tool - calibration of team with shared views of responses</li> <li>National and state recognition for community engagement - Published articles</li> </ol>										

$$\text{BCR} = \frac{464,779}{276,516} = 1.68:1$$

$$\text{ROI} = \frac{464,779 - 276,516}{276,516} \times 100 = 68.1\%$$

# Optimize Results

**Tell the Story: Communicate results to key stakeholders.**

Because Let's Talk is a grant funded program there is a requirement for an evaluation or ROI. The ROI will be reported during the application and monitoring stages of the grant. In addition, the ROI evaluation results will be presented initially at the Grant Coordination Meeting attended by Directors and Superintendent Office Leadership. Following the Grant Coordination Meeting, the decision for additional presentations to other stakeholders will be made.

**Guiding Principle/s: #1,2,&12**

**Optimize results: Use Black Box Thinking (Future Plans)**

Ask Management (Assistant Superintendents, Directors, Assistant Directors, Grant Coordination Meeting Leaders (3<sup>rd</sup> floor contacts) for recommendations for continued improvement.

Surveys (Parents, Stakeholders, Staff)



## Payoffs of the ROI Methodology®

- Align programs to business needs
- Show contributions of selected programs
- Earn respect of leaders, administrators, and donors
- Build staff morale
- Justify/defend budgets
- Improve programs
- Improve support for programs
- Identify ineffective programs that need to be redesigned or eliminated
- Identify successful programs that can be implemented in other areas

Why the ROI Methodology?







**Questions?**

