Exploring barriers to measuring ROI for training and development interventions: a case study on academic staff in South Africa

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A B S T R A C T

The objective of this article is to investigate obstacles that hinder the assessment of return on investment (ROI) for academic staff development initiatives in public universities in South Africa. The primary objective of this study is to address the following research inquiry: What are the obstacles hindering the assessment of return on investment (ROI) for training and development interventions offered to academics within the higher education landscape of South Africa? The study employed a qualitative research methodology, which was based on an interpretive philosophical standpoint. The researchers employed purpose sampling to carefully select a total of fourteen participants who were selected to represent a range of cases or institutions. These included six universities and government institutions, namely the Department of Higher Education and Training (DHET), the Department of Science and Innovation (DSI), and the Education, Training, and Development Practices Sector Education and Training Authority (ETDPSETA). The interview data was subjected to thematic analysis using ATLAS.ti. The factors that hinder the measurement of ROI include the intricacy of the process, insufficient capacity, time lag between training and improved performance, lack of motivation, financial limitations, absence of processes, fragmentation of training and development interventions, interventions producing non-financial advantages, and insufficient data. The study enhanced the existing information on human resource development and practice by identifying the obstacles to measuring return on investment (ROI). Additionally, it offered practical advice and suggestions for future research.

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Introduction

Human resources are the main factor in the success of an organisation, and as such, they must possess appropriate skills and competencies to achieve the organisational goals (Kajwang, 2022; Muhammed et al., 2023; Rahman & Sahu, 2022; Ye et al., 2023). As such, providing employees with the ability to succeed in this dynamic environment has become a strategic necessity (Calieno et al., 2022). Most managers are aware that training is essential when organisations are encountering significant growth, increased competition, or business restructuring (Calieno et al., 2022; Hedhili & Boudabbous, 2020; Phillips, 2012). In this scenario, employees must acquire new skills and typically shoulder additional responsibilities within a drastically reduced workforce (Phillips, 2012). Technological change and globalisation are swiftly transforming the workplace, creating demand for new skills and, in the meantime, making other skills obsolete (Calieno et al., 2022; Van den Berg et al., 2022). This is now more pertinent than ever, as in the last few years, the Coronavirus Disease 2019 (COVID-19) fast-tracked the new normal in the world, which has pushed organisations into remote-based and technology-dependent operations (Shibiti, 2022). In developed countries, the adoption of advanced digital technologies, including online platforms, 3D printing, the internet of things, artificial intelligence, advanced
robotics, augmented reality, drones, and big data analytics, is increasing exponentially (Brunello et al., 2023). This is motivated by declining costs and has lately been augmented by the COVID-19 pandemic (Brunello et al., 2023).

Given the technological necessity of transitioning activities to digital platforms, we anticipate that employees will acquire a novel skill set to ensure their continued relevance and productivity within the economic framework (Samuel & Moagi, 2022; Simplilearn, 2022). In the era of the fourth industrial revolution and in the post-COVID-19 period, the significance of training and development will be heightened (Brunello et al., 2023; Mikóójczyk, 2022; Westfall, 2022). Nevertheless, some organisations encountered difficulties regarding training and development due to the disruption of their training plans caused by the COVID-19 epidemic (Ceesay, 2021; Mikóójczyk, 2022; Simplilearn, 2022). Brunello et al. (2023) posit that the adoption of advanced digital technology by businesses is associated with a tendency to reduce per-employee training investment. Recognising the significance of allocating resources towards staff development in the aftermath of the COVID-19 pandemic is crucial in safeguarding the preservation of hard-earned accomplishments (World Bank, 2022).

There exists a positive correlation between investment in training and enhanced organisational performance, as evidenced by studies conducted by Garavan et al., (2021a), Muhammed et al., (2023), Rahman and Sahu (2022), and Ye et al., (2023). According to Garavan et al., (2021b), a considerable body of research has indicated that training has a positive impact on various aspects of organisational performance, including innovation, customer service quality, productivity, and financial performance. According to Muhammed et al. (2023), the literature indicates that training and development initiatives have the potential to facilitate employee self-development and satisfaction, enhance employee skills and knowledge, increase performance, align with organisational goals, and ultimately lead to the attainment of a competitive advantage. Poorani and Sullivan (2019) argue that it is imperative for CEOs and managers to substantiate the cost-benefit analysis of their human capital investment choices by producing concrete evidence that fosters a culture of engagement and contributes to financial outcomes. In a broader context, it is imperative for enterprises to critically evaluate the worth of their investments in training and educational interventions while also considering the comparative advantages of these investments in relation to other investment prospects that offer quantifiable and immediate results (Mun, 2021). Nevertheless, only a limited number of organisations provide reports on the advantages achieved as a result of implemented training and development activities.

The objective of this research was to investigate the obstacles that hinder the measurement of return on investment (ROI) for training and development interventions offered to academic staff in the setting of public higher education in South Africa. The measurement of return on investment (ROI) in training and development and performance improvement has been a significant concern in the past decade. In fact, even high-level executives have shown a growing interest in ROI statistics (Phillips, 2012). Topno (2012) states that the majority of organisations perform evaluations to assess satisfaction, whereas just a small number of them carry out ROI evaluations. Decision-makers in businesses have the main duty of determining the investment options that offer the greatest return while minimising the risk of loss (Mun, 2021). Nevertheless, assessing the additional worth contributed by training and development is a more intricate, if not unsolvable, task (Mun, 2021). The implementation of the costs and benefits technique presents challenges due to the inherent complexity of the training and development process, which surpasses that of the accounting approach (Shibiti, 2022). Human resource development (HRD) interventions encompass the manipulation of human behaviour, and the advantages derived from these interventions are typically influenced by other factors inside the business (Nemec, 2018; Olexsóva, 2018).

The assessment of return on investment (ROI) is deemed unsuitable and faulty by certain individuals, but others perceive it as the sole remedy for their issues with accountability (Phillips, 2012). Decision-makers can adopt a reasonable approach to difficulties and use a relevant combination of evaluation methodologies that include return on investment (ROI) by comprehending the inherent advantages and drawbacks of ROI and the driver of the process (Phillips, 2012). Despite some progress in ROI implementation, significant obstacles continue to impede the implementation of the idea. Furthermore, the majority of research on the influence of training on organisational performance has been carried out in an Anglo-American setting, specifically in the United Kingdom, United States, Australia, Canada, and New Zealand. As a result, the existing understanding of the connection may not be entirely precise when applied to the economies of Asia-Pacific, Africa, and the Middle East (Garavan, 2021b). Therefore, the objective of this study is to comprehend the obstacles that hinder the assessment of return on investment (ROI) for training and development initiatives offered to academics in the higher education setting of South Africa. While extensive research has been conducted on the measurement of return on investment (ROI) for training interventions in a broad sense, the specific inquiry posed in this article has thus far garnered limited scholarly focus. This assertion holds particular validity within the context of higher education in South Africa, where the evaluation of return on investment (ROI) for training interventions delivered to academic personnel is not conducted. Therefore, it is necessary to identify the obstacles and offer feasible remedies.

The primary objective of this study was to address the following research inquiry: What are the obstacles hindering the assessment of return on investment (ROI) for training and development interventions offered to academics within the higher education landscape of South Africa?

The subsequent sections of the essay encompass the literature review, methods, findings and discussions, conclusions, acknowledgments, and sources that were consulted.
Literature Review

Theoretical framework

Return on investment (ROI)

According to Moradi and Nematollahi (2019), finding correct opportunities for investment is significant since it helps to understand the optimum benefits to the economy. Hence, there is a need for measuring ROI on interventions that the government invests in. Return is the outcome that is achieved in the future from capital or funds invested (Florensia & Susanti, 2020; Sadikin & Dalimunthe, 2021). In its simplest form, ROI separates the incremental economic returns generated because of a certain option being taken in association with its marginal investment costs (Sadikin & Dalimunthe, 2021). Henceforth, the higher the ROI, the greater the financial return, the better use of financial resources (Mun, 2021; Schueller & Phil, 2020). The ROI methodology in training and development is systematically applied to measure the rate of return on the cost associated with training and development interventions (Abner, Valdez & Perry, 2021; Nemeck, 2018; Olexová, 2018; Schueller & Phil, 2020). Jack Phillips proposed the measurement of ROI, which was adopted from Kirkpatrick’s four levels of evaluation and added a fifth level (Weninger, 2020). The levels in Phillips’ evaluation model comprise reaction and planned action/perceived value, learning, job application and implementation, business results/impact, and finally ROI (Jasson & Govender, 2017; Mara, 2021; Sahoo & Mishra, 2017). The reaction level evaluates the satisfaction of trainees (Jasson & Govender, 2017). The learning level evaluates the extent to which learning has been attained during training namely, skills, knowledge, and attitude changes (Jasson & Govender, 2017). The behaviour level evaluates the actual implementation of learning in the workplace (Jasson & Govender, 2017). The results level measures the impact of training on organizational performance (Jasson & Govender, 2017; Olexová, 2018). Lastly, the ROI level focuses on the rate of monetary benefits achieved in relation to the costs (Abner et al., 2021; Schueller & Phil, 2020; Weninger, 2020). Although it could benefit this study to have a more explicit theoretical framework to guide the analysis of barriers to measurement, no such framework seems to exist. However, relevant literature and empirical findings related to ROI and training evaluation is integrated during the discussion of the findings to enhance the theoretical underpinning of the study.

Training and development of academic staff in South African public higher education context

Since democracy started in South Africa, the government formulated skills development policies and strategies acknowledging that skills development is a key strategic priority to realise the development needs of its citizens (Human Resource Development Council of South Africa, 2017). It is envisaged that public higher education institutions (HEIs) will play a critical role in the country’s socioeconomic advancement (DHET, 2017). As early as 2005, it was recognised that the higher education industry should be reconfigured to cater to the progressively technologically oriented economy (Ogude et al., 2005). According to Mwita, Kinunda et al., (2023), the ability of HEIs to provide market-powered competencies and skills to their students has been debatable for years. Furthermore, institutions of higher learning are expected to train people and produce research and knowledge to enable society to play an active role in a swiftly changing and competitive global environment and address national needs (Ogude et al., 2005). Hence there is a need to ensure that academic staff members are adequately prepared through various training and development interventions. In addition, staff development in the higher education sector enables staff and institutions of higher learning to achieve their interests (Botha, 2009). Training of academic staff is a progressive change that signifies an investment for the future and in addition to dealing with the unavoidable movement of academic staff, which will benefit the higher education sector in South Africa in terms of staff availability and capability (Council on Higher Education, 2022). According to Bruwer (2018), macroenvironmental factors at both local and global spheres have necessitated varied changes in the higher education sector. The innovative changes introduced are aimed at ensuring that education remains relevant and up to date (Bruwer, 2018). While the number of higher education student enrolments has increased significantly in South Africa, the academic staff complement has not increased in line with student enrolments resulting in an increased student-to-staff ratio over the past two decades (DHET, 2015; Webstock & Schoole, 2016). In addition, the reality is that the majority of the current staff in the higher education sector may not be in sync with the dynamic student profile, curriculum requirements, and context (DHET, 2015; Webstock & Fisher, 2016). When the world was affected by the COVID-19 pandemic, universities swiftly moved to online education (Disson, Padayachy, de Klerk, Conradie, MacAlister, Moch & Krull, 2022; Gamede, Ajani & Olufemi, 2022; Shava, 2022; Teräs, Teräs, Arinto, Brunton, Daryono & Subramaniam, 2020). The implementation of information communication technology (ICT) in higher education is more evident with the over-explosion of technological development we are in (Ndebele & Mmodila, 2022; Shava, 2022). However, as highlighted by the Council on Higher Education (2020 as cited in Gamede et al., 2022), the online learning management systems’ adoption and use in most South African universities is still underwhelming. The culture of using learning management systems for curriculum delivery by certain academics in developing countries is different compared to those in developed countries. This means that in most African universities, the effective implementation of learning management systems does not enable the students to explore curriculum contents (Gamede et al., 2022). Therefore, there is a need to capacitate academic staff to cope with the work demands and challenges presented by COVID-19, globalisation and the 4IR.

Various interventions were funded for the skills development of academic staff in the country. The skills levy system distributed R18.3 billion, of which a substantial portion was provided to the SETAs (R14.6 billion) while the NSF received R3.7 billion during the 2019/20 financial year (DHET, 2021). Of the R14.6 billion distributed to the SETAs, over R9 billion was used for discretionary grants, R3.7 billion for mandatory grants and R1.9 billion was used to cover administration costs (DHET, 2021). The staff
development of academic staff is provided on a continuum from more formal, organized interventions comprising degrees, short courses, and workshops, to less structured interventions based in the workplace (Leibowitz et al., 2015). ETDPSETA (2016) identified the critical skills for the higher education sector to include mentoring and coaching, curriculum and material development, facilitation, assessment and moderation, statistics, postgraduate supervision, advanced research, curriculum development for article publication, fundraising, project management, records management, and monitoring and evaluation. According to DHET (2015), the University Capacity Development Programme (UCDP), which encompasses the NESI, nGAP, EACEP, SSEP and SSSAU-DP was implemented by the department to develop the academic staff. The purpose of the UCDP programme is to transform and enhance the non-competing necessities of quality, equity, and success in universities (DHET, 2017). As the umbrella for academic staff development at the country’s universities, the UCDP proposes an integrated approach to capacity development and imagines enabled universities that can steer the areas that split staff, curriculum, and student development. As highlighted in Dayag and Trinidad (2019), all assets (financial or real) can be valued, but the details and the complexities of valuation will differ from case to case. Therefore, this article aimed to explore barriers to the measurement of ROI for the interventions highlighted above. The following section discusses the methodology adopted in this study.

Methodology

A research philosophy encompasses imperative assumptions about how the world is viewed (Bianchi, 2021). These assumptions underpin the research strategy and methods to be adopted. According to Matta (2022), researchers believe explicitly or implicitly in a range of philosophical assertions, and these assumptions might explain the method to be selected. The philosophy adopted by a researcher is influenced by a particular view on the relationship between knowledge and the process by which it is developed and practical considerations. This study was conducted from the interpretivist philosophical position. Interpretivism advocates that the researcher must understand the differences between humans in their role as social actors (Saunders, Lewis & Thornhill, 2015; Thanh & Thanh, 2015). Research methodology is the approach used to resolve research problems thoroughly or scientifically (Mishra & Alok, 2017; Patel & Patel, 2019). The methodological choices that researchers should consider in order to support evidence gathering include deciding between the use of qualitative or quantitative methods (Bianchi, 2021). The study assumed a qualitative approach as it was more focused on an in-depth understanding of the phenomena under investigation (Mishra & Alok, 2017). This study was exploratory, in that it aimed to establish the barriers to the measurement of return on investment for training interventions provided to academic staff in the South African public higher education context. The decision on the design of the study and its appropriateness was guided by the research problem and question. According to Gustafsson (2017), researchers must decide whether it is prudent to choose a particular case study or a multiple-case study to study a topic. A case study refers to a strategy for conducting research, which comprises an empirical investigation of a particular recent topic within its real-life setting using diverse sources of evidence (Bhattacherjee, 2012; Saunders et al., 2015). Conversely, a multiple-case design involves case study research in which various substantial confined cases are selected to generate a more holistic understanding of the topic than a sole case can deliver (Chmiliar, 2010). This study adopted a multiple-case design. A multiple-case study design was selected due to its usefulness when studying a topic little is known about or where researchers want to have a comprehensive understanding of the topic. In addition, it was important to determine whether there are similar or divergent results between cases (Gustafsson, 2017).

This study used cross-sectional data. Cross-sectional data is used when the variables of interest are collected simultaneously (Bryman, 2015) and is best suited to studies aimed at discovering the predominance of a phenomenon, problem, situation, issue, or attitude by selecting a sample of the population (Kumar, 2011). This study was conducted in South African public universities, and the purposive sampling strategy was used to choose participants. The participants included fourteen managers representing South African public universities and government institutions. Of the fourteen participants, three represented comprehensive universities (Case 1), another three represented universities of technology (Case 2), five represented traditional universities (Case 3) and the remaining three represented each of the three government institutions. To collect the data for this study, semi-structured interviews were conducted. An interview is a more personalized data collection option than questionnaires as scholars collaborate directly with the participants to ask questions and capture their responses (Bhattacherjee, 2012). This method enables participants to give detailed responses to interview questions (Ullah & Rafiq, 2021). The collected interview data was analysed through thematic analysis using Atlas.ti computer programme. Thematic analysis is a method for identifying, analysing, and reporting themes or patterns within data (Castleberry & Nolen, 2018; Maguire & Delahunt, 2017). The main purpose of conducting thematic analysis is to highlight themes in the data that show substantial patterns, and then use these themes to answer research questions and draw conclusions (Maguire & Delahunt, 2017).

In the next section, the findings emanating from interviews will be presented and discussed.
Findings and Discussion

The themes that were identified during data analysis are presented in Table 1.

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Source: Authors’ compilation

The barriers to the measurement of ROI are presented and discussed below including direct quotes from the participants.

Complexity of the process

Participants highlighted that the ROI process is complicated, and they do not have a thorough understanding of how the process should be implemented to the letter. The following statements were mentioned:

Case 1: "Those are the kind of measures that we look at, you know, to see whether the university is, in fact, getting a return on their investment. It is, however, very difficult to [measure]."

“This is probably the most difficult part in training."

“I really think this is a very complex area.”

Case 3: “It is very difficult for universities, therefore, to measure return on investment because they are themselves centers of training.”

Universities were unable to measure the ROI owing to the complexity of the process. The participants were of the view that the ROI process is complex and not easy to implement. This is supported by Phillips's (2012) viewpoint that although the interest in ROI has increased and considerable progress has been made, it is still a problem that troubles even the most progressive and sophisticated HRD departments. Evaluating the value added by training and development is more complicated and difficult to measure (Mun, 2021; Olexová, 2018; Topno, 2012).

Lack of capacity

The second barrier to the measurement of return on investment was the lack of capacity to embark on the process. Participants in the three cases highlighted the following regarding lack of capacity:

Case 1: “We, unfortunately, due to capacity constraints at the moment don't have a system where we do a follow-up.”

“You know you have to interview every person that goes through training, and we do hundreds of people, so it becomes very time-consuming for such a small cohort of individuals to do this while still trying to do training and development for every other staff member.”

Case 2: “There are many people at the university; there are 3 000 and something. There is no way I'll be able to check everybody.”

“And as much as we have the know-how and the skills to do it within my team, our capacity is constrained.”

Case 3: “The University is still new. We do not have the capacity. I think as the university grows, then that is when they will see a need to say now, we need an administrator that will help in this portfolio. But at the moment, I am still alone. But according to the structure, there are people that will be coming.”

There was a general lack of capacity to measure the ROI for training and development interventions in all three cases. This is supported by Phillips's (2012) stance that many training and performance improvement professionals do not fully comprehend how ROI should be measured and they do not have the basic skills required to implement the process within their line of responsibilities.

Lag between training and improved performance

It was further revealed that universities were unable to measure return on investment for training interventions provided to academic staff because there is usually a lag between training and performance. The following was mentioned:

Case 1: “Training takes a long time for behaviour to change.”
“I know that in the market, it is currently very difficult to really quantify the return on investment on training because the results are not imminent. The yield does not necessarily come immediately.”

“You cannot go for training today and already tomorrow you want to see the return on investment.”

The lag between training and performance was one of the barriers that universities faced when it comes to measuring ROI. As highlighted by Mun (2021), you cannot assume that there will be any economic impact within two or three years in the narrow sense from a research programme unless it is an extraordinary research discovery.

**Lack of will**

Another factor that was alluded to as the barrier to the measurement of ROI was the lack of will by those who are involved. Participants highlighted the following:

Case 1: “We use the Kirkpatrick’s level the four levels, but we hardly ever get to the ROI level.”

Case 2: “That is the challenge. I do not think we do much of that [measuring ROI]. And people are just being trained and then they come back.”

From the above quotes, it is evident that to some extent, there is no willingness to embark on the process of measuring ROI. Hence, in most instances, it is not measured.

**Financial constraints**

The fifth theme that was identified was financial constraints. The following was highlighted:

Case 2: “The portfolio is quite loaded due to obviously the financial constraints and capacity or resources constraints within the university.”

ROI was not measured due to financial constraints. The lack of financial resources to support any process is more likely to lead to the process not being successfully conducted. The measurement of ROI is no exception and adequate resources should be allocated for it to be conducted successfully. According to Philips (2012), the ROI process must be economical and must be implemented easily. The ROI process includes extra costs and time to the evaluation process of programs, even though the added amount is usually not excessive (Phillips, 2012). The extra investment in ROI could be compensated by the improved results realised from the programs and the eradication of unprofitable or unproductive programs.

**Lack of processes**

Participants were of the view that there was no clear process of how ROI should be measured especially for training and development interventions provided to academics. The following was mentioned during the interviews regarding the lack of adequate processes:

Case 2: “There’s no real instrument other than the performance leadership engagement process that we want to implement where we can measure the real return on investment.”

“So, for us is currently a gap within the institution.”

Case 3: “...there is no formal tool that we use to assess a general investment. I doubt if we do have formal programs.”

“The impact and how we measure, we do not really have a tool specific to measure that...”

The above quotes demonstrate that participants did not have appropriate processes and procedures that they could implement to measure ROI for training and development interventions provided to academic staff. The data revealed that there was a lack of adequate processes that can be used to measure the ROI for the training and development interventions provided to academic staff in Cases 2 and 3. According to Philips (2012), in a quest to achieve statistical excellence and use too many theories, some ROI models have become too complex to understand and use and ended up not being implemented.

**Fragmentation of training and development interventions**

The fragmentation of training and development interventions was also identified as one of the themes pertaining to barriers to the measurement of ROI. The following was mentioned:

Case 3: “We know that we contribute, but we cannot say that we change everything for someone’s practice. So, we are very cautious in not making broad statements that would be overselling.”

“Return on the money is very difficult because it’s a lot of punctual interventions.”

The quote above shows that it was difficult to measure ROI due to various training and development interventions that are provided to academic staff, of which some are unrelated. Data revealed that in Case 3, there was a fragmentation of training and development interventions that were provided. Academic staff often attended several training and development interventions provided by various units in universities simultaneously. This fragmentation of training data resulted in those who were supposed to measure the ROI of
programs not being able to do so. According to Phillips (2012), the ROI process should identify the contribution of the training and development intervention when contrasted with the other influences.

Interventions yielding non-financial benefits

Participants in Cases 2 and 3 were of the view that most training and development interventions that are provided to academics yield non-financial benefits and as a result, making it difficult to measure ROI. The following was highlighted:

Case 2: “... we come from an environment where it is not per se like people selling an item. So, you cannot say someone actually, they did so many sales this month. After training, they did so many sales which would increase revenue ...”

Case 3: “You cannot measure it with money, but you can measure it by impact and visibility.”

“Other training for research ethics committee members, that one there is nothing to measure. How would you measure that one? We still do not know.”

The statements demonstrate that participants were unable to measure the actual ROI because the benefits that academic staff generate after attending various training sessions cannot be translated into monetary terms. To measure ROI, the financial benefits associated with training and development intervention need to be established. However, this is not always possible. The data revealed that universities in Cases 2 and 3 were unable to measure ROI because some of the training and development interventions result in strictly non-financial benefits. According to Phillips (2012), the ROI process must be useable with all types of data including soft data, which represents customer satisfaction, job satisfaction, grievances, absenteeism, turnover, and complaints, and hard data, which are typically included as costs, output, quality, and time. Complications when measuring ROI occur when indirect costs or returns, as well as soft skills and intangibles, are prevalent, which may or may not be related to the decision and may or may not certainly be caused by it (Mun, 2021).

Lack of data

The last theme that was identified was the lack of data. The following was mentioned:

Case 3: “The expectation is that in the future, we will be able to look at all the data at [the institution] and say, okay, that person is an ERP, which is the emerging researcher programme member. They have managed to secure that funding and have participated in this training. But at this stage, the database doesn't talk to each other.”

“But because my team doesn't have the necessary access to all the grant data, it's not something that we are able to cross-track at this stage.”

The data revealed that in Case 3, there was a need for access to the required data from the institution. However, some institutions were systemically poor at recording HRD and other operational data or are hesitant to make their numbers available to internal or external groups. According to Phillips (2012), the most time consuming of all steps in the ROI process is the data collection stage. Since the process is time-consuming, practitioners working in training and development end up not collecting the necessary data. The challenge when it comes to measuring ROI is when the required information cannot be located (Phillips & Phillips, 2016). Provided that the relationship between training and associated organizational performance has been studied widely and is essential to the arguments that learning, and development practitioners make to rationalize investment in training, a major concern pertains to the quality of the evidence accessible (Garavan, 2021b).

This study further found that measuring ROI by government institutions for the training interventions that they have funded universities to provide was not something that was being conducted. The following was alluded to pertaining to this matter by participants from government institutions:

“We crafted some indicators, but those indicators we agreed with them. They said this is what we are planning to achieve in terms of your programme. So, we do not monitor anything which is outside our strategies.”

“To be honest, we have not conducted the return-on-investment evaluation to check whether those programs have been effective.”

“We have not done it and we do it for other institutions, but we have not done this specifically for universities to check the impact of those funding and the programs that we have rolled out in the universities. However, the universities themselves do from time to time evaluate some of the interventions that they do with the organization and the success thereof, and then they will recommend to us for example that no, we no longer require this particular programme, and the organization must change the programme or the funding, or something like that.”

The government institutions’ role was to provide funding and support, but the responsibility for measuring the impact of the training and development interventions was left to the universities themselves. The government institutions focused on establishing targets and plans at the beginning and ensuring that there was monitoring, evaluation and oversight.
Conclusions

The objective of this article was to investigate obstacles that hinder the assessment of return on investment (ROI) for academic staff development initiatives in public universities in South Africa. The study employed a qualitative research methodology, which was based on an interpretive philosophical standpoint. The participants were selected via purposive sampling. The study included participants from six universities, including DSI and ETDPSETA. Thematic analysis was conducted on the data using the ATLAS.ti software. The obstacles to quantifying return on investment (ROI) for training and development initiatives offered to academic staff in South African public universities encompassed the intricacy of the procedure, insufficient capability, a delay between training and enhanced performance, a dearth of motivation, financial limitations, inadequate procedures, fragmentation of training and development interventions, interventions resulting in non-monetary advantages, and insufficient data. To accurately assess return on investment (ROI), universities must guarantee that they empower the Human Resource Development (HRD) department.

Sufficient resources should be supplied to ensure that individuals responsible for measuring ROI do not experience excessive stress and loss of motivation. This will, to a certain degree, enhance their inclination to initiate the process. In addition, managers should permit HRD practitioners to carry out longitudinal research rather than mandating short-term outcomes, as there is typically a delay between training and performance, particularly for academic personnel. Furthermore, it is imperative to establish protocols that will effectively gather the necessary data.

The dataset should encompass both monetary and non-monetary data. The adoption of approaches for isolating the effect of other factors and the conversion of non-financial results to monetary worth, as suggested by Jack Phillips, the pioneer of the ROI methodology, is recommended.

Recommendations

Future research should focus on investigating suitable methodologies for assessing return on investment (ROI) in the realm of academic staff training and development within the higher education setting. In order to address the obstacles mentioned in this article, it is necessary to examine the elements that enable the assessment of return on investment (ROI) for training and development programmes offered to academic staff in the higher education setting.

Limitations

An inherent limitation of this study was the utilisation of open-ended interview questions, which prompted participants to provide responses based on their personal experiences. We recognise that several participants may have inadvertently overlooked certain aspects of their institutional operations as a result of inadequate instructions throughout the questionnaire, especially when utilising closed-ended questions. An additional constraint of this study was that the conclusions were derived from the firsthand encounters of the fourteen participants at a certain moment, which could vary at a later moment.

Acknowledgment

This article is a proceeding of a doctoral study conducted at the University of South Africa by the first author under the supervision of the second author. The authors would like to acknowledge and thank the institutions that granted the permission and the participants who provided their invaluable input and time.


Funding information: This research article received no specific funding or grants. The University of South Africa provided financial support for the editing and publication of this article.

Informed Consent Statement: Informed consent was obtained from all subjects involved in the study.

Data Availability Statement: The data presented in this study are available on request from the corresponding author. The data are not publicly available due to restrictions.

Conflicts of interest: The authors declare that they have no financial or personal relationships that may have inappropriately influenced them in drafting this article.

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