

FACILITATOR ANSWER SHEET 1 – RECRUITMENT METRICS CASE STUDY

Case: Recruitment Performance at Sunrise Savings & Loans

Data Given

- Headcount at start of year = **180**
- Job offers made = **36**
- Job offers accepted (new hires) = **30**
- Total recruitment cost = **GHS 180,000**
- Total days to fill all positions = **1,200 days**
- Headcount at end of year = **210**

1.0 Headcount (Start of Year)

Already given: **180 employees**

2.0 New Hires

Number of people who accepted offers and joined: **30 employees**

3.0 Offer Acceptance Rate

$$\begin{aligned}\text{Offer Acceptance Rate} &= \frac{\text{Offers Accepted}}{\text{Offers Made}} \times 100 \\ &= \frac{30}{36} \times 100 = \mathbf{83.3\%}\end{aligned}$$

A **reasonable Offer Acceptance Rate** typically falls within this range:

- 70% to 80%** is considered **acceptable**
- 80% to 90%** is considered **strong**
- Above 90%** is considered **excellent**

A Rate of 83.3% means this:

- Candidates view the organisation as credible and attractive.
- Compensation and job conditions are broadly competitive.
- The recruitment process is not turning people off.
- The employer brand is working.

4.0 Time to Fill

$$\text{Time to Fill} = \frac{\text{Total days}}{\text{Positions filled}}$$

$$= \frac{1,200}{30} = \mathbf{40 \text{ days}}$$

A **reasonable Time to Fill** generally falls within this range:

- a. **30 to 45 days** for frontline and operational roles
- b. **45 to 60 days** for specialist, compliance, or managerial roles
- c. **60 to 90 days** for senior management or highly technical positions

What would raise concern is:

- a. Under **25 days** consistently, which may signal rushed hiring
- b. Over **60 days**, which often signals bottlenecks, talent shortages, or process inefficiencies

5.0 Cost per Hire

$$\text{Cost per Hire} = \frac{\text{Total recruitment cost}}{\text{Number of hires}}$$

$$= \frac{180,000}{30} = \mathbf{GHS 6,000}$$

6.0 Employee Growth Rate

$$\text{Employee Growth Rate} = \frac{\text{Ending Headcount} - \text{Starting Headcount}}{\text{Starting Headcount}} \times 100$$

$$= \frac{210 - 180}{180} \times 100$$

$$= \frac{30}{180} \times 100 = \mathbf{16.7\%}$$

A **0 to 5% growth rate** usually means the organization is stable but not expanding.

A **5 to 15% growth rate** is considered **healthy and sustainable growth**.

A **15 to 25% growth rate** signals **rapid expansion**.

Anything **above 25%** is usually a warning sign, meaning hiring is running faster than training, controls, and management systems can keep up.

What These Numbers Tell Participants

- a. The firm is growing moderately at **16.7%**
- b. Recruitment efficiency is reasonable at **40 days per hire**
- c. **83% acceptance rate** suggests employer brand is healthy
- d. **GHS 6,000 per hire** gives management a benchmark for budgeting

FACILITATOR ANSWER SHEET 2 – ATTRITION AND RETENTION METRICS CASE STUDY

Case: Attrition and Retention at Sunrise Savings & Loans

Data Provided

- a. Headcount at start of year = 180
- b. Headcount at end of year = 210
- c. Employees who left = 24
- d. Early leavers (within 12 months) = 8
- e. Promotions = 15
- f. Vacancies filled = 30
- g. Payroll at start = GHS 9,000,000
- h. Payroll at end = GHS 10,350,000

1.0 Average Headcount

$$\begin{aligned} \text{Average Headcount} &= \frac{\text{Beginning Headcount} + \text{Ending Headcount}}{2} \\ &= \frac{180 + 210}{2} = \frac{390}{2} = \mathbf{195} \end{aligned}$$

2.0 Attrition Rate

$$\begin{aligned} \text{Attrition Rate} &= \frac{\text{Employees who left}}{\text{Average Headcount}} \times 100 \\ &= \frac{24}{195} \times 100 = \mathbf{12.3\%} \end{aligned}$$

3.0 Early Turnover Rate

$$\begin{aligned} \text{Early Turnover Rate} &= \frac{\text{Early leavers}}{\text{Total leavers}} \times 100 \\ &= \frac{8}{24} \times 100 = \mathbf{33.3\%} \end{aligned}$$

4.0 Turnover per Department

Department	Leavers	Turnover Share
Sales & Marketing	10	41.7%
Operations	7	29.2%
Finance & Admin	4	16.7%

IT & Support	3	12.5%
Total	24	100%

5. Internal Promotion Rate

$$\begin{aligned} \text{Internal Promotion Rate} &= \frac{\text{Internal Promotions}}{\text{Vacancies Filled}} \times 100 \\ &= \frac{15}{30} \times 100 = \mathbf{50\%} \end{aligned}$$

6.0 Salary Change Rate

$$\begin{aligned} \text{Salary Change Rate} &= \frac{\text{Ending Payroll} - \text{Starting Payroll}}{\text{Starting Payroll}} \times 100 \\ &= \frac{10,350,000 - 9,000,000}{9,000,000} \times 100 \\ &= \frac{1,350,000}{9,000,000} \times 100 = \mathbf{15\%} \end{aligned}$$

7.0 Retention Rate

$$\text{Retention Rate} = \frac{\text{Employees who stayed}}{\text{Starting Headcount}} \times 100$$

Employees who stayed = 180 – 24 = **156**

$$= \frac{156}{180} \times 100 = \mathbf{86.7\%}$$

What These Numbers Tell Participants

- Attrition at **12.3%** is moderate for a growing financial institution
- 33% early turnover** signals onboarding or hiring quality issues
- 50% internal promotion** shows strong internal career mobility
- 15% payroll growth** aligns with expansion and promotions
- 86.7% retention** shows a fairly stable workforce

FACILITATOR ANSWER SHEET 3 – EMPLOYEE ENGAGEMENT METRICS CASE STUDY

Case: Employee Engagement at Sunrise Savings & Loans

Data Provided

- a. Total employees at time of survey = 210
- b. Survey respondents = 168
- c. Average engagement score (across dimensions) = 4.0 out of 5

eNPS Breakdown (from 168 respondents):

- a. Promoters = 90
- b. Passives = 50
- c. Detractors = 28
- d. Employees who participated in recognition & reward programmes = 120
- e. Average manager feedback score = 3.8 out of 5

1.0 Employee Engagement Index

This represents the overall engagement score expressed as a percentage.

$$\begin{aligned}\text{Employee Engagement Index} &= \frac{\text{Average Engagement Score}}{\text{Maximum Score}} \times 100 \\ &= \frac{4.0}{5.0} \times 100 = \mathbf{80\%}\end{aligned}$$

NB:

- Below 60% - Low engagement.
- 60% – 69% - Moderate engagement.
- 70% – 79% - Good engagement.
- 80% – 85% - High engagement.
- Above 85% - Very high engagement.

With an **Employee Engagement Index of 80%**, Sunrise Savings & Loans sits in the **high engagement range**. This indicates: strong employee commitment, effective leadership and communication, and a positive work environment.

2.0 Pulse Survey Participation Rate

$$\begin{aligned}\text{Participation Rate} &= \frac{\text{Survey Respondents}}{\text{Total Employees}} \times 100 \\ &= \frac{168}{210} \times 100 = \mathbf{80\%}\end{aligned}$$

NB:

Below 50% - Poor participation.

50% – 59% - Weak participation.

60% – 69% - Fair participation.

70% – 79% - Good participation.

80% and above - Strong participation.

With a **Pulse Survey Participation Rate of 80%**, Sunrise Savings & Loans falls into the **strong participation category**. This suggests: employees feel safe providing honest feedback, communication channels are effective, and survey results can be relied upon for decision-making.

3.0 Employee Net Promoter Score (eNPS)

First calculate percentages:

$$\text{Promoters \%} = \frac{90}{168} \times 100 = 53.6\%$$

$$\text{Detractors \%} = \frac{28}{168} \times 100 = 16.7\%$$

Then calculate eNPS:

$$\text{eNPS} = \text{Promoters \%} - \text{Detractors \%}$$

$$= 53.6\% - 16.7\% = +36.9$$

$$\text{(eNPS)} = +37$$

NB:

Below 0 - Poor.

0 to +10 - Weak.

+10 to +30 - Good.

+30 to +50 - Very good.

Above +50 - Excellent.

With an **eNPS of +37**, Sunrise Savings & Loans sits in the **very good range**. This indicates: employees are proud to work in the organisation, staff are likely to recommend the company to others, and engagement levels are translating into advocacy.

4.0 Recognition & Reward Participation Rate

$$\text{Recognition Participation Rate} = \frac{\text{Employees Recognised}}{\text{Total Employees}} \times 100$$

$$= \frac{120}{210} \times 100 = 57.1\%$$

NB:

Below 40% - Low participation.

40% – 59% - Moderate participation.

60% – 75% - Good participation.

75% – 85% - Strong participation.

Above 85% - Excellent participation.

With a **Recognition & Reward Participation Rate of 57.1%**, Sunrise Savings & Loans falls into the **moderate participation range**. This suggests: recognition mechanisms are in place, but access may not be consistent across branches or roles, and there is room to make recognition more inclusive and systematic.

5.0 Manager Feedback Score

Already provided in the case:

- a. **Manager Feedback Score = 3.8 out of 5**

(Equivalent to **76%** if converted to a percentage)

NB:

Below 3.0 - Weak leadership effectiveness.

3.0 – 3.4 - Fair but fragile.

3.5 – 3.9 - Good leadership performance.

4.0 – 4.4 - Strong leadership effectiveness.

4.5 and above - Excellent leadership.

With a **Manager Feedback Score of 3.8 out of 5**, Sunrise Savings & Loans sits in the **good leadership performance range**. This suggests: managers are generally supportive and communicative, leadership behaviours are positively impacting engagement, but targeted coaching could elevate performance further.

What These Numbers Tell Participants

- a. **80% engagement index** indicates generally positive engagement, but room for improvement.
- b. **80% participation rate** shows strong survey credibility.
- c. **eNPS of +37** reflects a healthy level of employee advocacy.
- d. Recognition coverage at **57%** suggests recognition is present but not yet inclusive.
- e. Manager feedback at **3.8/5** points to good leadership effectiveness, with opportunity for coaching.

FACILITATOR ANSWER SHEET 4 – EMPLOYEE EXPERIENCE METRICS CASE STUDY

Case: Employee Experience at Sunrise Savings & Loans

Data Provided

- Average workforce = 195 employees
- Working days per employee per year = 240 days
- Total workdays lost due to absenteeism = 2,340 days
- Average working hours per day = 8 hours
- Average hourly cost per employee = GHS 35

Survey Scores:

- Employee feedback score = 3.9 out of 5
- Workload satisfaction score = 3.6 out of 5
- Workplace well-being index = 4.0 out of 5

1.0 Absenteeism Rate

$$\text{Absenteeism Rate} = \frac{\text{Total Absence Days}}{\text{Total Available Workdays}} \times 100$$

Total available workdays:

$$195 \times 240 = 46,800 \text{ workdays}$$

$$\text{Absenteeism Rate} = \frac{2,340}{46,800} \times 100 = \mathbf{5.0\%}$$

NB:

Below 2% - Very low absenteeism.

2% – 4% - Healthy and acceptable range.

4% – 6% - Moderate absenteeism.

6% – 8% - High absenteeism.

Above 8% - Critical level, including burnout, poor leadership, unsafe conditions, or weak policies.

With an **Absenteeism Rate of 5%**, Sunrise Savings & Loans falls into the **moderate but acceptable range**. This suggests: attendance is generally stable, but the organisation should monitor workload and well-being, especially in fast-growing or high-pressure units.

2.0 Average Absence Days per Employee

$$\begin{aligned}\text{Average Absence Days} &= \frac{\text{Total Absence Days}}{\text{Total Employees (Average Workforce)}} \\ &= \frac{2,340}{195} = \mathbf{12 \text{ days}}\end{aligned}$$

NB:

0–5 days - Very low absence.

6–8 days - Healthy and acceptable range.

9–12 days - Moderate absence.

13–15 days - High absence.

Above 15 days - Critical level. Indicates systemic issues requiring immediate management and HR intervention.

With an **Average Absence of 12 days per employee**, Sunrise Savings & Loans sits at the **upper end of the moderate range**. This suggests: absence is not yet alarming, but there may be pressure points in workload or well-being, proactive action could prevent escalation.

3.0 Employee Feedback Score

Already provided:

- **Employee Feedback Score = 3.9 out of 5**

(Equivalent to **78%** if expressed as a percentage)

NB:

Below 3.0 - Poor.

3.0 – 3.4 - Fair.

3.5 – 3.9 - Good.

4.0 – 4.4 - Very good.

4.5 and above - Excellent.

With an **Employee Feedback Score of 3.9 out of 5**, Sunrise Savings & Loans sits at the **upper end of the good range**, close to very good. This suggests: employees have a positive day-to-day experience, systems and processes are mostly working, targeted improvements could push the organisation into a high-performance experience zone.

4.0 Workload Satisfaction Score

Already provided:

- **Workload Satisfaction Score = 3.6 out of 5**

(Equivalent to **72%**)

NB:

Below 3.0 - Poor.

3.0 – 3.4 - Fair.

3.5 – 3.9 - Good.

4.0 – 4.4 - Very good.

4.5 and above - Excellent.

With a **Workload Satisfaction Score of 3.6 out of 5**, Sunrise Savings & Loans falls within the **good range**. This indicates: workloads are generally manageable, pressure exists but is not overwhelming, targeted process improvements or staffing adjustments could raise satisfaction further.

5.0 Workplace Well-being Index

Already provided:

- **Workplace Well-being Index = 4.0 out of 5**

(Equivalent to **80%**)

NB:

Below 3.0 - Poor well-being.

3.0 – 3.4 - Fair well-being.

3.5 – 3.9 - Good well-being.

4.0 – 4.4 - Very good well-being.

4.5 and above - Excellent well-being. Best-in-class workplace health culture with low burnout and high resilience.

With a **Workplace Well-being Index of 4.0 out of 5**, Sunrise Savings & Loans sits in the **very good range**. This suggests: employees feel supported and cared for, well-being initiatives are effective, the organisation is reducing long-term health and burnout risks.

6.0 Attendance Rate

$$\text{Attendance Rate} = 100\% - \text{Absenteeism Rate}$$

$$= 100\% - 5.0\% = \mathbf{95.0\%}$$

NB:

Below 92% - Poor attendance.

92% – 94% - Fair attendance.

95% – 96% - Good attendance.

97% – 98% - Very good attendance.

Above 98% - Excellent attendance.

With an **Attendance Rate of 95%**, Sunrise Savings & Loans falls squarely in the **good attendance range**. This indicates: employees are largely present and reliable, absenteeism is controlled, operational continuity is stable.

7.0 Average Hourly Cost

Already provided in the case:

- **Average Hourly Cost = GHS 35**

8.0 Cost of Absenteeism

Step 1: Calculate total hours lost

$$2,340 \text{ days} \times 8 \text{ hours} = 18,720 \text{ hours}$$

Step 2: Multiply by hourly cost

$$18,720 \times 35 = \text{GHS } 655,200$$

What These Numbers Tell Participants

- a. A **5% absenteeism rate** is moderate but financially significant.
- b. **12 absence days per employee** suggests workload or well-being pressure.
- c. High well-being score contrasts with absence data, indicating potential branch-level or role-specific issues.
- d. Absenteeism cost of **GHS 655,200** highlights why employee experience is a financial issue, not just an HR concern.

FACILITATOR ANSWER SHEET 5 – PERFORMANCE METRICS CASE STUDY

Case: Performance Management at Sunrise Savings & Loans

Data Provided

- a. Total revenue = **GHS 42,000,000**
- b. Net profit = **GHS 8,400,000**
- c. Average headcount = **195 employees**
- d. Full-Time Equivalents (FTEs) = **185**
- e. Total employee-related costs = **GHS 10,500,000**

Performance data:

- a. Average performance rating = **3.8 out of 5**
- b. High performers = **52 employees**
- c. Employees on PIP = **18**
- d. Employees successfully exiting PIP = **12**
- e. Employees who achieved goals = **156**

Operational data:

- a. Total transactions = **1,950**
- b. Transactions with errors = **78**

Customer experience data:

- a. Customer satisfaction (high-performing branches) = **4.4 / 5**
- b. Customer satisfaction (lower-performing branches) = **3.7 / 5**

Service delivery hours:

- a. Total available hours = **160,000 hours**
- b. Billable / revenue-generating hours = **124,800 hours**

1.0 Revenue per Employee

$$\text{Revenue per Employee} = \frac{\text{Total Revenue}}{\text{Average Headcount}}$$

$$= \frac{42,000,000}{195} = \text{GHS 215,385}$$

NB:

For savings and loans institutions and similar financial services:

- a. Revenue per employee is **generally acceptable** when it comfortably exceeds **total cost per employee** by a healthy margin.
- b. Many well-run institutions target a **minimum of 2–3 times payroll cost per employee** in revenue contribution.

2.0 Profit per FTE

$$\begin{aligned}\text{Profit per FTE} &= \frac{\text{Net Profit}}{\text{Number of FTEs}} \\ &= \frac{8,400,000}{185} = \mathbf{GHS\ 45,405}\end{aligned}$$

NB:

For savings and loans and similar institutions:

- A commonly accepted rule is that **profit per FTE should comfortably cover at least 20–30% of total employee cost per FTE.**
- Boards focus less on the absolute figure and more on: consistency, sustainability, and comparison across branches and business lines.

3.0 Human Capital ROI

$$\begin{aligned}\text{Human Capital ROI} &= \frac{\text{Revenue} - \text{Employee Costs}}{\text{Employee Costs}} \\ &= \frac{42,000,000 - 10,500,000}{10,500,000} \\ &= \frac{31,500,000}{10,500,000} = \mathbf{GHS\ 3.0}\end{aligned}$$

(For every **GHS 1** invested in people, **GHS 3** is generated)

4.0 Average Performance Rating

Already provided:

- **Average Performance Rating = 3.8 out of 5**

(Equivalent to **76%**)

NB:

Below 3.0 - Weak performance culture.

3.0 – 3.4 - Fair performance.

3.5 – 3.9 - Good performance.

4.0 – 4.4 - Very good performance.

4.5 and above - Excellent performance.

With an **Average Performance Rating of 3.8 out of 5**, Sunrise Savings & Loans falls in the **good performance range**. This indicates: performance expectations are largely

being met, appraisal systems are functioning, there is room to raise standards without destabilising morale.

5.0 High Performer Rate

$$\begin{aligned}\text{High Performer Rate} &= \frac{\text{High Performers}}{\text{Average Headcount}} \times 100 \\ &= \frac{52}{195} \times 100 = \mathbf{26.7\%}\end{aligned}$$

NB:

Below 15% - Low. Indicates weak performance differentiation.

15% – 30% - Healthy and acceptable range.

Above 30% - High. Can signal a strong talent pool, but often suggests rating inflation or weak performance calibration if sustained.

Sunrise Savings & Loans recorded a **High Performer Rate of 26.7%**, which falls squarely in the **healthy and acceptable range**. This indicates: performance standards are being applied realistically, top talent is being identified and recognised, the organisation is avoiding both under-recognition and over-rating.

6.0 Performance Improvement Plan (PIP) Success Rate

$$\begin{aligned}\text{PIP Success Rate} &= \frac{\text{Successful PIP Exits}}{\text{Employees on PIP}} \times 100 \\ &= \frac{12}{18} \times 100 = \mathbf{66.7\%}\end{aligned}$$

NB:

Below 40% - Low.

40% – 70% - Healthy and acceptable range.

Above 70% - High.

Sunrise Savings & Loans recorded a **PIP Success Rate of 66.7%**, placing it in the **healthy and acceptable range**. This indicates: PIPs are being used as a corrective and developmental tool, managers are actively coaching underperformers, and performance management is fair and supportive.

7.0 Goal Achievement Rate

$$\text{Goal Achievement Rate} = \frac{\text{Employees Who Achieved Goals}}{\text{Average Headcount}} \times 100$$

$$= \frac{156}{195} \times 100 = \mathbf{80.0\%}$$

NB:

Below 60% - Low.

60% – 80% - Acceptable and healthy range.

Above 80% - High.

Sunrise Savings & Loans recorded a **Goal Achievement Rate of 80%**, placing it at the **upper end of the acceptable range**. This indicates: goals are largely clear and achievable, accountability mechanisms are functioning, there may be room to stretch targets slightly for top performers.

8.0 Billable Utilization Rate

$$\text{Billable Utilization Rate} = \frac{\text{Billable Hours}}{\text{Available Hours}} \times 100$$

$$= \frac{124,800}{160,000} \times 100 = \mathbf{78.0\%}$$

NB:

Below 65% - Low.

65% – 80% - Acceptable and healthy range.

Above 80% - High.

Sunrise Savings & Loans recorded a **Billable Utilization Rate of 78%**, which falls within the **healthy and acceptable range**. This indicates: employees are well utilised without being overstretched, capacity is being managed effectively, there is limited idle time but still room for quality and development activities.

9.0 Quality of Work / Error Rate

$$\text{Error Rate} = \frac{\text{Transactions with Errors}}{\text{Total Transactions}} \times 100$$

$$= \frac{78}{1,950} \times 100 = \mathbf{4.0\%}$$

Error Rate = 4.0% (Equivalent Quality Level = **96% accuracy**)

NB:

Above 5% - High and unacceptable.

2% – 5% - Moderate and acceptable.

Below 2% - Low and strong.

Sunrise Savings & Loans recorded an **Error Rate of 4%**, which falls within the **moderate but acceptable range**. This suggests: processes are generally working, quality controls are present, further training or workflow improvements could reduce rework and cost.

10.0 Customer Satisfaction Linked to Employee Performance

Difference in customer satisfaction scores:

$$4.4 - 3.7 = 0.7$$

NB:

Below 3.5 - Low.

3.5 – 4.2 - Acceptable and healthy range.

Above 4.2 - High.

Insight:

- a. **High-performing branches: 4.4 / 5 → High customer satisfaction**
- b. **Lower-performing branches: 3.7 / 5 → Acceptable but improvable**

This clearly demonstrates that:

- a. employee performance has a direct impact on customer experience,
- b. higher performance standards lead to better customer outcomes,
- c. investing in people capability improves service quality.

with higher-performing employees score **0.7 points higher** in customer satisfaction, demonstrating a clear link between employee performance and customer experience.

What These Numbers Tell Participants

- a. Revenue and profit per employee show solid productivity for a growing institution.
- b. A **Human Capital ROI of 3.0** indicates strong returns on people investment.
- c. **26.7% high performers** suggest a healthy but improvable performance distribution.
- d. **66.7% PIP success** shows performance management is corrective, not punitive.
- e. **78% utilization** is strong but signals potential capacity optimisation.
- f. Error rate and customer satisfaction clearly reinforce the performance–quality–customer link.

FACILITATOR ANSWER SHEET 6 – LEARNING & DEVELOPMENT METRICS CASE STUDY

Case: Learning & Development at Sunrise Savings & Loans

Data Provided

- a. Average workforce = **195 employees**
- b. Total training hours delivered = **4,875 hours**
- c. Total training and development cost = **GHS 780,000**
- d. Employees trained during the year = **150 employees**
- e. Productivity before training = **GHS 210,000 per employee**
- f. Productivity after training = **GHS 235,000 per employee**

1.0 Average Training Hours per Employee

$$\begin{aligned}\text{Average Training Hours per Employee} &= \frac{\text{Total Training Hours}}{\text{Average Workforce}} \\ &= \frac{4,875}{195} = \mathbf{25 \text{ hours}}\end{aligned}$$

NB:

Below 15 hours: Low. Indicates limited skills development and higher risk of capability gaps, especially in regulated or fast-changing environments.

15 – 30 hours: Healthy and acceptable range. Reflects consistent learning that supports performance and compliance.

Above 30 hours: High. Signals strong investment in development, but should be monitored to ensure training translates into performance.

2.0 Training Cost per Employee

$$\begin{aligned}\text{Training Cost per Employee} &= \frac{\text{Total Training Cost}}{\text{Average Workforce}} \\ &= \frac{780,000}{195} = \mathbf{GHS 4,000}\end{aligned}$$

NB:

In many financial and professional services organisations:

- a. Training cost per employee is often considered acceptable when it falls within **1%–3% of average annual salary per employee.**
- b. Boards focus less on the absolute figure and more on **impact and ROI.**

Sunrise Savings & Loans recorded a **Training Cost per Employee of GHS 4,000**. Given the productivity gains and **Training ROI of over 380%**, this level of spend is **acceptable and well-justified**.

3.0 Performance Gain Value

First calculate the performance gain per trained employee:

$$235,000 - 210,000 = 25,000$$

Then calculate the total performance gain value:

$$25,000 \times 150 = \mathbf{GHS\ 3,750,000}$$

NB:

Performance Gain Value is considered acceptable when:

- gains are **quantifiable**, not subjective,
- improvements are linked directly to job performance, and
- gains comfortably justify the investment in training.

Most organisations expect **at least a 1.5x–2x return** on training-related performance gains to consider them worthwhile.

Sunrise Savings & Loans recorded a **Performance Gain Value of GHS 3.75 million**, against a training investment of **GHS 780,000**.

This is **strong**, because:

- gains significantly exceed training costs,
- performance improvement is measurable, and
- results support a very high Training ROI (over 380%).

4. Training ROI (%)

$$\begin{aligned}\text{Training ROI} &= \frac{\text{Performance Gain Value} - \text{Training Cost}}{\text{Training Cost}} \times 100 \\ &= \frac{3,750,000 - 780,000}{780,000} \times 100 \\ &= \frac{2,970,000}{780,000} \times 100 = \mathbf{380.8\%}\end{aligned}$$

NB:

Below 100%: Low or weak. Training is not generating sufficient value to justify the investment. This signals misaligned content, poor application, or weak follow-up.

100% – 200%: Acceptable and healthy. Training is delivering clear value and covering its cost with additional performance gains.

Above 200%: Strong. Training is generating multiple times its cost in measurable performance improvements.

5.0 Training & Development Access Rate

$$\text{Training Access Rate} = \frac{\text{Employees Trained}}{\text{Average Workforce}} \times 100$$

$$= \frac{150}{195} \times 100 = \mathbf{76.9\%}$$

NB:

Below 50%: Low access. Development opportunities are limited or uneven, creating skill gaps and equity concerns.

50% – 75%: Acceptable and healthy access. A majority of employees are receiving development opportunities, though some groups may still be underserved.

Above 75%: High access. Learning is broadly inclusive and embedded across the organisation.

FACILITATOR ANSWER SHEET 7 – DIVERSITY, EQUITY, AND INCLUSION METRICS CASE STUDY

Case: Diversity, Equity, and Inclusion at Sunrise Savings & Loans

Data Provided

1. Total workforce = **210 employees**
 - a. Male = **120**
 - b. Female = **90**
2. Average salaries:
 - a. Male = **GHS 58,000**
 - b. Female = **GHS 52,000**
3. Leadership roles = **40 positions**
 - a. Male = **28**
 - b. Female = **12**
4. Promotions during the year = **30**
 - a. Male = **18**
 - b. Female = **12**
5. Total overtime cost = **GHS 420,000**
 - a. Male = **GHS 270,000**
 - b. Female = **GHS 150,000**

1.0 Workforce Diversity Ratio

Workforce Diversity:

- a. Male: **57.1%**
- b. Female: **42.9%**

NB:

Highly imbalanced: One group dominates the workforce significantly, often **above 70%**. This may signal barriers in recruitment, progression, or workplace culture.

Reasonably balanced: No single group exceeds roughly **60%**, and representation reflects the available talent pool. This is the **generally acceptable range**.

Well balanced: Representation is close to parity, typically **45%–55%**, indicating strong inclusive hiring and retention practices.

Sunrise Savings & Loans has:

- a. **57.1% male**
- b. **42.9% female**

This places the organisation in the **reasonably balanced range**, which is **acceptable** for most financial institutions. It suggests:

- a. recruitment practices are fairly inclusive,

- b. the focus should now shift to **leadership representation, pay equity, and career progression** rather than entry-level diversity alone.

2.0 Gender Pay Gap (%)

$$\begin{aligned} \text{Gender Pay Gap} &= \frac{\text{Male Avg Salary} - \text{Female Avg Salary}}{\text{Male Avg Salary}} \times 100 \\ &= \frac{58,000 - 52,000}{58,000} \times 100 \\ &= \frac{6,000}{58,000} \times 100 = \mathbf{10.3\%} \end{aligned}$$

NB:

A gender pay gap is generally considered acceptable when:

- a. it can be **clearly explained** by role level, experience, or performance, and
- b. there is **no unexplained gap** for comparable roles and grades.

Leading organisations aim to keep unexplained gaps **below 5%**.

Sunrise Savings & Loans recorded a **Gender Pay Gap of 10.3%**, which sits **just above the acceptable threshold**. This suggests: pay structures should be reviewed by role and grade, progression and promotion patterns may need attention, and corrective actions may be required to prevent long-term inequity.

3.0 Salary Averages by Group

Already provided in the case:

- a. **Male average salary: GHS 58,000**
- b. **Female average salary: GHS 52,000**

4.0 Representation in Leadership Roles

$$\text{Male Leadership Representation} = \frac{28}{40} \times 100 = \mathbf{70\%}$$

$$\text{Female Leadership Representation} = \frac{12}{40} \times 100 = \mathbf{30\%}$$

NB:

Under-Representation

When a group holds **significantly fewer leadership positions** than its share of the overall workforce. This signals barriers to progression and inclusion.

Reasonably Aligned

Leadership representation broadly reflects workforce composition, usually within **±10 percentage points**. This is generally **acceptable**.

Well Balanced

Leadership representation closely mirrors workforce diversity or shows strong progress toward parity. This reflects inclusive leadership pipelines.

Sunrise Savings & Loans has:

- a. **42.9% female workforce**
- b. **30% female leadership representation**

This shows a **12.9-point gap**, placing the organisation in the **under-representation category**. It suggests:

- a. women are entering the organisation but not progressing into leadership at the same rate,
- b. succession planning and leadership development need attention,
- c. governance oversight is required to close the gap.

5.0 Promotion Rate by Gender

Male Promotion Rate

$$\frac{18}{120} \times 100 = \mathbf{15\%}$$

Female Promotion Rate

$$\frac{12}{90} \times 100 = \mathbf{13.3\%}$$

NB:

Unequal / Concerning

A difference of **more than 5 percentage points** between groups. This suggests potential bias, unequal access to opportunities, or pipeline issues.

Acceptable / Monitored

A difference of **within ±5 percentage points**. Some variation exists, but outcomes are broadly equitable.

Well Balanced

Promotion rates are **very close or equal** across groups, reflecting fair and transparent progression practices.

Sunrise Savings & Loans recorded:

- a. **Male promotion rate:** 15%
- b. **Female promotion rate:** 13.3%

The difference is **1.7 percentage points**, which falls within the **acceptable and monitored range**. This indicates: promotion decisions are largely equitable, no immediate red flags of systemic bias, and continued monitoring is necessary to ensure consistency over time.

6.0 Overtime Cost Distribution (%)

Male Overtime Cost Share

$$\frac{270,000}{420,000} \times 100 = \mathbf{64.3\%}$$

Female Overtime Cost Share

$$\frac{150,000}{420,000} \times 100 = \mathbf{35.7\%}$$

NB:

Highly Imbalanced

When one group consistently accounts for **more than 65–70%** of overtime costs without a clear role-based explanation. This signals workload concentration, staffing gaps, or access inequities.

Acceptable but Monitored

When overtime distribution broadly reflects **role mix and workforce composition**, even if not equal. Differences should be explainable by operational needs.

Well Balanced

When overtime costs are **proportionate to workforce representation and role requirements**, and no group is consistently overburdened.

Sunrise Savings & Loans recorded:

- a. **Male overtime cost share:** 64.3%
- b. **Female overtime cost share:** 35.7%
- c. **Workforce split:** 57.1% male, 42.9% female

This places Sunrise in the **acceptable but monitored range** because: male overtime share is higher than workforce representation, the difference may be role-driven, and HR should assess whether certain functions or shifts are disproportionately assigned.

What These Numbers Tell Participants

- a. Workforce gender balance is relatively healthy, but leadership representation is skewed.
- b. A **10.3% pay gap** warrants review of role levels, progression, and pay equity.
- c. Promotion rates are close but still slightly favour men.
- d. Overtime distribution suggests workload imbalance or role concentration.