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Lessons from the Battlefield

Making a Difference that Makes a Difference

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Building a culture of evaluation in Organisation Development

Liz Finney



Abstract

Carrying out evaluations within complex living systems isn't straightforward, but in the prevailing economic climate we at Roffey Park would argue that it is critically important. As we emerge into a post-recession world, we believe that being able and willing to demonstrate the impact of OD will be imperative if the discipline is to maintain and increase its credibility. In this article I will examine both the benefits and the practicalities of embedding evaluation into OD interventions.

Key words-

evaluation, methodologies, impact, evidence, accountability, outcomes, credibility

Introduction

I know that there are people in the OD community who will be reading this article with some scepticism. Garrow et al's 2009 study for the Institute for Employment Studies concludes that, among practitioners, there is little focus on measuring OD's impact. Some feel that its systemic nature makes it too hard to measure; how do you establish causality amongst a mass of intervening factors? Others feel that it goes against the nature of OD even to try to evaluate our work. The very word 'evaluation' carries connotations of bureaucratic box-ticking, defensive budget justification and the mechanistic cramming of complex human systems into rigid numerical formulae.

Some assume that evaluation is based primarily on quantitative measurement and practitioners without training in these methodologies can feel paralysed by their inexperience. Many clients, inclined to be more future-focused than reflective, may not be pressing for evaluation. And what if the evaluation tells you that the results of your work are not what you hoped for? As Peter Shepherd of Ashridge Consulting reflected:

"It's a rare client ... that can really take a learning or be very self-assured about failure ... Everything can feel quite fragile."

But if you're not evaluating might you be missing opportunities to add value to your work? To improve your practice? To enhance the credibility of the discipline of OD? Developers who embed an evaluation element into their proposals show themselves to be accountable for the results they deliver. As we emerge into a post-recession world this accountability will, I believe, give practitioners a competitive edge in a challenging market.

In this article I make the case for OD evaluation, based on Roffey Park's 2009 research study *Best Practice in OD Evaluation*. I explore how it adds value when it's included and also offer a set of practical tips on how to evaluate successfully, including a simple toolkit of evaluation methodologies. I conclude with an invitation to join Roffey Park in continuing the debate on how to build a culture of evaluation in OD.

What drives evaluation?

In our research we talked to more than twenty experienced OD practitioners, who agreed that not enough evaluation is happening in the field of OD; at least not in a formal way. When it does happen, it is often the personal philosophy of the developer that drives it. Professor Warner Burke, co-creator of the Burke-Litwin model of organisational performance and change, put it like this:

“What I do should not be based on charisma; it should be based on evidence.”

Some practitioners saw evaluation as a means to demonstrate the impact of OD, enhancing its – and their own – image and credibility. Where clients are knowledgeable about evaluation and its benefits they not only become a driving force but may also provide access to existing measurement data. And increasingly, requirements for accountability and financial justification, particularly in the public sector, are widespread and non-negotiable. The ability to demonstrate return on investment may now be a deciding factor in winning work.

10 ways evaluation adds value

Our research participants told us how the process of evaluation has enriched their work as OD practitioners in a whole range of ways. Evaluating OD is not just about justifying expenditure; it can also be about learning, improving and increasing understanding, as well as recognising and celebrating success. Financial justification aside, its primary purpose should be not to prove, but to improve. We distilled these 10 benefits from our research participants' reflections:

1. Talking about evaluation helps to clarify desired outcomes and informs the choice and design of interventions.

Planning an evaluation requires us to specify where we are now and where we want to be. This entails a thorough diagnosis of the current situation and definition of the aim of the intervention with clear links to organisational goals. Thinking about how you might see, note and measure when desired outcomes are achieved is a way of shaping them in specific and tangible ways

2. Evaluation during an OD intervention helps to keep it on track, refocus, reassess possibilities, or spot and act on unexpected effects.

Evaluation data can act as a temperature check to help make sure the intervention is on the right track. Ed Griffin, another of our interviewees, likened evaluation to a navigational aid:

“If you think about an OD intervention as setting out on a long journey, then evaluation of an intervention might be like checking out on your Sat Nav where you now are, and then how much further you still have to go ... and what the route is you're going to take ”

3. Evaluation can be a valuable OD intervention in its own right, reinforcing or complementing the other work going on.

Evaluation can be seen as a form of Action Research, in which we learn about organisations by trying to change them. This is often portrayed as a cyclical process, where a change is first planned and acted upon; what happens following the change is observed and reflected upon; and then further action is planned, the cycle repeating itself. The very process of evaluation can highlight the areas we want to change and focus people's attention on them.

4. Evaluation enables learning about how OD interventions impact on organisations, and how they can be developed or improved.

Evaluation can provide evidence on which to base decisions about what works, what doesn't and what could be done differently next time. It can also determine whether unforeseen problems or by-products have arisen as a consequence of the intervention.

5. The process of evaluation can enhance relationships and energise and inspire both participants and practitioners.

Being asked for their views and experiences as part of an OD evaluation can be a positive and engaging experience for participants and practitioners alike. And creating energy and engagement with the intervention can help build trust and gain commitment.

6. Evaluation can help to develop OD as a discipline, adding to its credibility and client understanding of what it can deliver.

Evaluation can add to our understanding of the mechanisms of organisational change. Building a body of solid evidence for the 'results' of OD enhances its reputation and helps to ensure it is taken seriously as a discipline.

7. Evaluation can demonstrate that investment in OD was worthwhile.

Evaluation helps to ensure clients 'get what they pay for'. Are the expected results being achieved? Is the investment of time, money and resources delivering a return? Our data suggest that the developer's credibility grows if they are able to provide a reporting system that tracks the return on investment being delivered by the intervention.

8. Evaluation can be used to recognise and celebrate change efforts.

Evaluation provides information that can be fed back to participants in OD programmes, informing them about progress, increasing engagement and recognising their contribution. By collecting, recording and publicising people's stories, the developer can create 'functional myths' which propagate a positive narrative about a change programme. As research participant Martin Fischer commented:

"The point's really the hopefulness. I think the real use of evaluation is to create functional myths around what works ... a functional myth as against a disabling myth."

9. Evaluation can help practitioners with their own professional development.

Evaluation can provide practitioners with valuable learning to help them develop and improve their own professional practice. By paying attention to what has worked and what hasn't, the developer can translate evaluation data into deepening their own expertise.

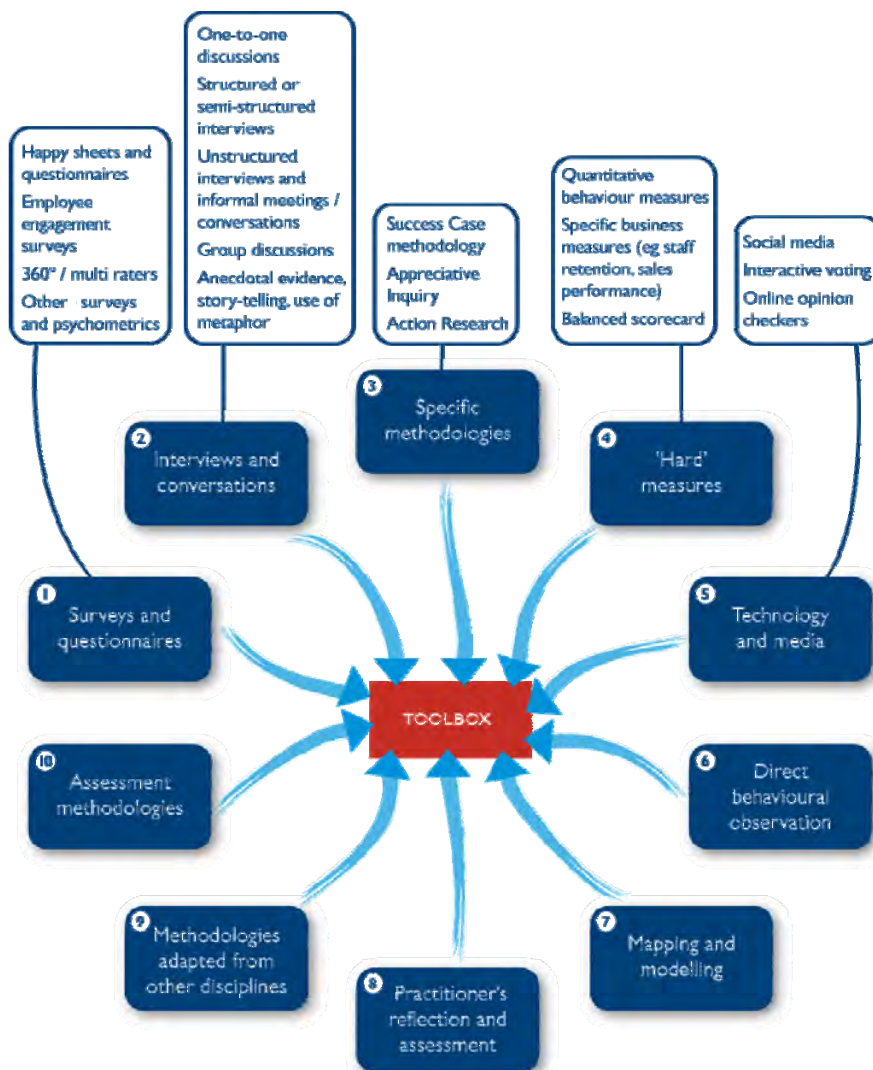
10. Evaluation can help external consultants win business.

Finally, evaluation can be a powerful tool in helping OD practitioners to develop their own business and secure new client contracts. Not only can developers refer to previous evaluations as supporting evidence for the quality of their work, they can also offer evaluation as part of their service to clients. In the current climate, where budgets are under overwhelming pressure, this may increasingly be the deciding factor in winning business.

Building an evaluation toolkit

In Figure 1, below, we give a brief overview of some of the tools available to the evaluator. This is a toolkit that encompasses the quantitative and the qualitative, the simple and the sophisticated. To an extent, the research expertise of the developer will dictate the methodology chosen; many methods do require analytical skills to make sense of the data. But don't forget, you can always bring in evaluation expertise from outside.

Figure 1: An OD evaluation toolkit



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Descriptions of how these methodologies can be harnessed in the evaluation of OD can be found in Roffey Park's research report *Best Practice in OD Evaluation*.

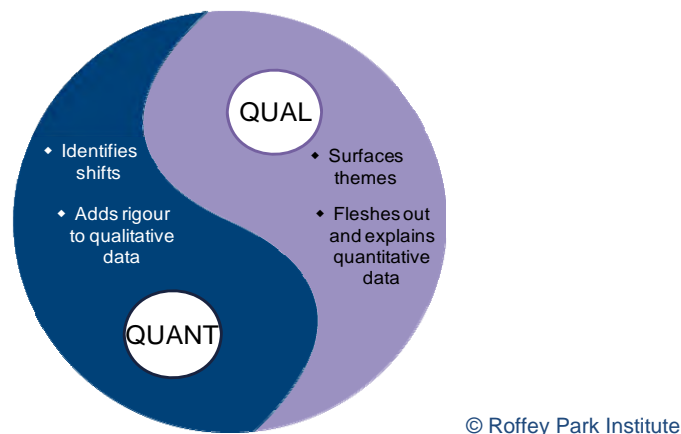
Finding a Third Way

Many OD practitioners have a preference for either qualitative or quantitative evaluation methods, based on their background and training, personal philosophy and world view. Based on this research and on our own experience in the field of evaluation, we would advocate the fertile middle ground of a mixed approach, a 'third way', combining both qualitative and quantitative methods. In our interview with him Professor Warner Burke put it like this:

"I always do a combination of qualitative and quantitative. I don't think that one by itself gives you the full picture of what's going on. Interview data helps you to understand what the numbers are telling you."

At its best, the relationship between qualitative and quantitative methodology is cyclical and symbiotic; one approach feeds off the other to enrich and clarify the stories each is telling. To illustrate this relationship we imagined the Yin and Yang figure, below.

Figure 2: The symbiotic relationship of qualitative and quantitative methodology



Planning your evaluation

So where to start? We have created a simple flow chart which may help you to frame a meaningful evaluation of your work (see Figure 3).

There is no one formula for evaluation. Different categories of intervention (intra-personal, inter-personal, inter-group and total system) need different approaches, as do different organisational cultures. In order to build the right toolkit one must return to the original purpose of the intervention. What needs to be measured? Is it learning, behaviour, or the application of one or both of these to the improvement of capability or outcome? The crucial thing is to have the best conversation you can with the right people at the earliest possible stage to work out what it is you are trying to measure.

It is also important to consider the key drivers of the outcomes you are aiming for. OD is often about changing people's behaviour as a way of influencing other outcomes; encouraging a greater focus on quality may improve products, and thence customer satisfaction, and thence sales, for example. So evaluating the extent to which quality is a core focus may be a valid measurement of a key business driver.

Figure 3: Planning an OD evaluation



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Few OD interventions reach their goals in one step. Along the way there will be a number of milestones, and evaluation at these points can help determine if the intervention is going in the right direction, or if some reassessment is called for. It is useful to determine what these milestones will be at the outset.

There will often be long and short term aspects to an OD intervention. In the short term there may be specific problems that need to be ironed out before the organisation can progress. What are they and how will you know when they've gone? In the longer term there may be changes in strategy or behaviour that take some time to become embedded in the system. What indicators will help you track these changes?

Based on these success measures you will need to choose which methodologies will deliver the data you are looking for, working within the resources at your disposal. Don't forget that there may be existing measurements within the organisation that you can tap into, or you may need to collect new data. The toolkit described above will help here; or you may want to bring in some research expertise from elsewhere.

Timing is crucial as well, and needs to tie in with the milestones you have identified. To identify a shift from an original state it is first necessary to understand what the original state was. Pre-test/post-test comparisons allow you to detect differences in opinion, behaviour or systems between two given points in time: before an intervention and after it. Just asking the same question at different times can tell a powerful story about the way that an organisational system has shifted. But in order to identify changes you need to make sure your measurement is in place before and after the elements of the intervention you are assessing.

Then there are some practical considerations; do you have the resources and expertise in place to collect and analyse the data you need? And finally, in what format will you report the data, so that it is of practical use both to you and the client? How will you present your data so that it is clear and accessible, highlighting the outcomes of the intervention and their relevance to the organisation, and so that you can use it as a learning resource?

Building a culture of evaluation in OD

At Roffey Park we believe that a change of attitude is needed in OD, acknowledging all the difficulties and complexities associated with evaluation, but looking to see what's possible in a constructive way. OD practitioners need to develop a 'measurement mindset' and seek training in research techniques as part of their development. Partnering with evaluation experts will also help deliver robust results.

We would also encourage what Mee-Yan Cheung-Judge of the Quality and Equality consultancy calls 'intellectual scavenging' when it comes to evaluating OD interventions. Dr Cheung-Judge has called OD a 'magpie discipline' and we should exploit that tendency when it comes to evaluation. We should borrow shamelessly from other disciplines (learning and development and marketing, for example) adapting methodologies to our own needs. Ongoing debate within the OD community will ensure that best practice is shared.

We at Roffey Park look forward to being part of the debate, and to supporting OD professionals in showing the impact that their work has in organisations across the world.

About the author:

Liz Finney is a senior researcher at Roffey Park Institute in West Sussex, and co-author of *Best Practice in OD Evaluation: Understanding the impact of organisational development*, (available at www.roffeypark.com/research). Her other research interests include HR business partnering, employee engagement and leadership development for technical and professional experts. Liz Finney can be contacted at: liz.finney@roffeypark.com.

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