



# Best practice in OD evaluation

Understanding the impact of  
organisational development

Liz Finney and Carol Jenkins

## Executive Summary

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# Executive Summary

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This report investigates how we can evaluate the impact and effectiveness of organisational development (OD) interventions.

We approached our research aware that there are many practitioners in the field of OD who believe that its systemic nature makes it hard to measure; some hold a world view that says it's inappropriate even to try. Some talk about the evaluation of OD interventions as a 'holy grail,' perhaps implying that to seek it would be a hopeless quest. Evaluation is something which is often overlooked, avoided, or included only as an afterthought when an OD intervention has already taken place.

Evaluating within complex living systems isn't straightforward, but in the prevailing economic climate we would argue that it is critically important. And as we emerge into a post-recession world, we believe that being able and willing to demonstrate the impact of OD on the effectiveness of organisations will be imperative if the discipline is to maintain and increase its credibility.

## **Sharing best practice and finding the third way**

We were also aware that there is little practical guidance available for practitioners who do want to evaluate their work. So we wanted to collect examples, not of common practice, but of best practice in the evaluation of OD interventions; we wanted our research to be of practical use.

As we talked to our sample of 23 experienced practitioners we found ourselves taking the position that, whilst it is important to understand and acknowledge the philosophical debate surrounding the evaluation of OD initiatives, in the end the debate is unproductive. We advocate a pragmatic 'third way', combining the strengths of subjectivist and objectivist positions, using both qualitative and quantitative approaches to produce solutions that are greater than the sum of their parts.

But we don't advocate evaluation for its own sake. We believe that it should only take place if it's going to be used to change something; as a catalyst for action. This might be an action to change the course of the intervention or to inform changes in the practitioner's approach to future projects. The purpose of evaluation is not to prove, but to improve.

## **Evaluation adds value**

Evaluation adds value to the OD practitioner's work in all kinds of ways. Talking about evaluation helps to clarify desired outcomes and informs the choice and design of interventions. Evaluation during an OD intervention helps to keep it on track, refocus, reassess possibilities, or spot and act on unexpected effects. It can be a valuable OD intervention in its own right, reinforcing or complementing the

other work going on. It enables learning about how OD interventions impact on organisations, and how they can be developed or improved.

The process of evaluation can enhance relationships and energise and inspire both participants and practitioners. It can help to develop OD as a discipline, adding to its credibility and client understanding of what it can deliver; demonstrating that investment in OD was worthwhile. Evaluation feedback can be used to recognise and celebrate change efforts, can help practitioners with their own professional development, and can help external consultants win business.

### **The importance of early conversations**

Our research confirmed the importance of defining what success looks like in early conversations with clients. Having the best conversation you can at the earliest stage with key stakeholders will help ensure that you are measuring the right things. Having the support of influential stakeholders will also help you secure the resources and commitment you need to support an evaluation.

### **Choosing the right tools**

Our research revealed the importance of flexing evaluation frameworks and tools, adapting them to the context and culture of the organisation and the unique nature of the intervention. When it comes to building an evaluation toolkit, one size does not fit all.

You need to know what you want to measure, accommodate stakeholder requirements, juggle the time-cost-quality equation, seize opportunities to make pragmatic use of existing data and, if necessary, bring in some outside evaluation expertise. And existing methods may not be up to capturing the complex, sometimes intangible outcomes of OD; it may be necessary to invent your own tools – or get someone in to help you.

### **Don't try to boil the ocean**

It isn't always easy to come up with a set of simple, tangible measures because of the complexity and unpredictability of OD, but it is essential in order to achieve a meaningful evaluation. It is also important to be able to repeat an evaluation exercise for comparison purposes. An over-complicated methodology may make this difficult or even impossible.

However, practitioners should resist the temptation to measure what is easily accessible, rather than relevant and helpful.

### **Expect challenges**

There will be challenges along the way. It can be difficult to manage the expectations and anxieties of stakeholders who want to see quick and tangible results from OD; to overcome scepticism, lack of trust or resistance from participants; to measure the intangible or the emergent; to identify causal relationships amongst a mass of intervening factors; to work with practical or

resource issues. And the evaluation may deliver unwanted news, putting pressure on either your integrity, your relationship with your client, or both.

### **Trends and influences on evaluation**

Our research surfaced a number of trends in the evaluation of OD, most notably an increasing emphasis on accountability. This was already emerging before the current economic crisis, but its importance will increase significantly as we move through and out of the recession. The development of good practice in evaluation will make practitioners more accountable and increase clarity of understanding of the value OD can bring to an organisation. These changes will lead to increased credibility for OD as a discipline and, in turn, make it easier to evaluate OD interventions.

Developments in technology have made it possible to make use of measures in organisations that were previously difficult or time-consuming. There is also a growing trend for evaluation to be viewed and used as a means of learning and improving, with a constructive rather than a critical focus.

### **Building a culture of evaluation in OD**

Several of our research participants thanked us for the opportunity to articulate their practice, and suggested that this research would be a valuable starting point for a debate within the OD community on how to develop expertise and share best practice in evaluation.

Some discussed the idea of building a model or framework to help practitioners evaluate their work. Others proposed developing professional standards for OD evaluation, and talked about the importance of embedding it in OD practice.

We believe that a change of attitude is needed in the wider field of OD; acknowledging all the difficulties and complexities associated with evaluation, but looking to see what's possible in a constructive way.

We 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.

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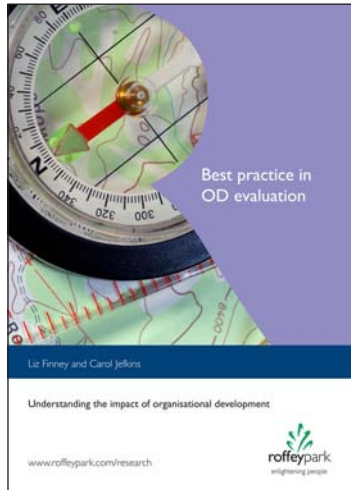
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Roffey Park Institute, Forest Road, Horsham, West Sussex, RH12 4TB, United Kingdom

Tel: +44 (0) 1293 851644 Fax: +44 (0) 1293 851565

e-mail: [info@roffeypark.com](mailto:info@roffeypark.com) [www.roffeypark.com](http://www.roffeypark.com)

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