Evaluating OD using Adaptive Action

27th February 2019
Think of something you have evaluated or are evaluating...

To what extent was it:

- Qualitative
  - At a single point in time
  - Small-scale
  - Individual impact
  - ? - -

- Quantitative
  - At multiple points over time
  - Large-scale
  - System impact
  - ? - -
Searching for the diamonds & the holy grail in evaluation?

- Credible
- Valuable
- Multifaceted
- Strong
- Attractive
- Dynamic
- Participative
- Contextual

@NHSE_DoOD
Case Study: the aim

• To design, develop and implement a summary/meta evaluation of five collaborative national OD projects

• Aim of all these projects is to develop OD capability and are delivered across the network of NHS Leadership Academies

• Evaluation to be participative, co-designed with relevant stakeholders

• Small resource

• Expert support
Why?

• Demonstrate a difference OD activity is making (or not)

• Justify investment

• To inform & improve future development

• Learn more about OD

• Learn more about evaluation

• To utilise good OD methodology and practice
Assumptions

• All of our OD activity makes a difference in some way

• We can demonstrate this somehow

• This work is complex

• Evaluation needs to take into account complexity of social systems

• We are not telling the story well enough

• That we can utilise OD methodology
What, so what and now what?
What have we got?

• High complexity

• Looking at a system of activity

• Mix of development, assurance and utilisation of OD capability

• Mixed evaluation methodology already in place
So what methodology would be helpful?

- Is this an evaluation design that looks particularly through the lens of complexity?

- Definition of evaluation: *The making of a judgement about the amount, number, or value of something; assessment.*

- Whose judgement? How do we define value? What’s the data we need?

- What’s the stories we need to tell where and to who?
Ways of looking at evaluation ....

LEADer framework

Work of: Quinn Patton, Cheung Judge, Roffey Park
Developing a Meta-Evaluation Framework

Aim:

- a single evaluation design that is useful across the entire system (open to multiple uses at different scales)
- not constrained by any particular OD capability framework

Process:

1. Look for patterns
2. Build models
3. Test and refine the models
4. Design the evaluation process
5. Implement
6. Embed, adapt and extend

@NHSE_DoOD
1. Look for patterns
2. Build models
3. Test and refine the models
4. Design the evaluation process
5. Implement
6. Embed, adapt & extend

Data: existing programme evaluations

- Claiming Practice
- Consulting Skills
- OD Essentials
- Virtual Mentoring
- NHS I

@NHSE_DoOD
1. Look for patterns
2. Build models
3. Test and refine the models
4. Design the evaluation process
5. Implement
6. Embed, adapt & extend

What is common across programmes?

Virtual Mentoring

What are the differences that matter?

Claiming Practice

Consulting Skills

OD Essentials

NHS I

@NHSE_DoOD
1. Look for patterns
2. Build models
3. Test and refine the models
4. Design the evaluation process
5. Implement
6. Embed, adapt & extend

HSD models & methods used in this step

Pattern Spotters
- Generalizations: In general, I notice . . .
- Exceptions: In general . . ., except . . .
- Contradictions: On one hand . . ., on the other . . .
- Surprises: I didn’t expect that . . .
- Puzzles: I wonder . . .

Whole, Part, Greater Whole System

CDE Portrait—Pattern Logic

Same and Different

Simple Rules
effective simple rules are:
- few
- generalizable
- positive
- active

@NHSE_DoOD
1. Look for patterns
2. Build models
3. Test and refine the models
4. Design the evaluation process
5. Implement
6. Embed, adapt & extend

Build models **from observed patterns!**

**(Grounded Theory)**

What is common across programmes?

What are the differences that matter?

- Virtual Mentoring
- Claiming Practice
- Consulting Skills
- OD Essentials
- NHS I

@NHSE_DoOD
1. Look for patterns
2. Build models
3. Test and refine the models
4. Design the evaluation process
5. Implement
6. Embed, adapt & extend

**Instructional Strategies**: approaches used in instructional design and programme components within them

**Design Decisions**: key decisions in the design of an individual programme

**System Impact Model**: how programme components map to system impact at different scales

**Simple Rules**: simple rules for OD practice in the NHS
1. Look for patterns
2. Build models
3. Test and refine the models
4. Design the evaluation process
5. Implement
6. Embed, adapt & extend

Test the models

Review (by OD leads)
Test against existing data

Revise the models

Integrate models (from 4 to 2)
Revise details
1. Look for patterns
2. Build models
3. Test and refine the models
4. Design the evaluation process
5. Implement
6. Embed, adapt & extend

- Who will use the evaluation outputs and how
- Scale and scope of the evaluation
- Process and timing
- Infrastructure and support

@NHSE_DoOD
1. Look for patterns
2. Build models
3. Test and refine the models
4. Design the evaluation process
5. Implement
6. Embed, adapt & extend

Start evaluating!
1. Look for patterns  
2. Build models  
3. Test and refine the models  
4. Design the evaluation process  
5. Implement  
6. Embed, adapt & extend

First embed as a live process, which builds capacity for objective decision-making about OD dev programmes.

Later, review every 6 - 12 months. Are the programme intentions the same? Do the models need to adjust?
In your work, think of an evaluation you’re involved in. How does some of this resonate? What questions do you have?

If you were evaluating, what patterns would you look for? How does the idea of pattern-spotting resonate for you?