ORGANISATION DEVELOPMENT

Evaluating OD using Adaptive Action

27th February 2019

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Think of something you have evaluated or are evaluating...

To what extent was it:

Qualitative	⟷	Quantitative
At a single point in time	⟷	At multiple points over time
Small-scale	⟷	Large-scale
Individual impact	⟷	System impact
- - ? - -	⟷	- - ? - -

Searching for the diamonds & the holy grail in evaluation?

- Credible
- Valuable
- Multifaceted
- Strong
- Attractive

- Dynamic
- Participative
- Contextual

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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

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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

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What, so what and now what?

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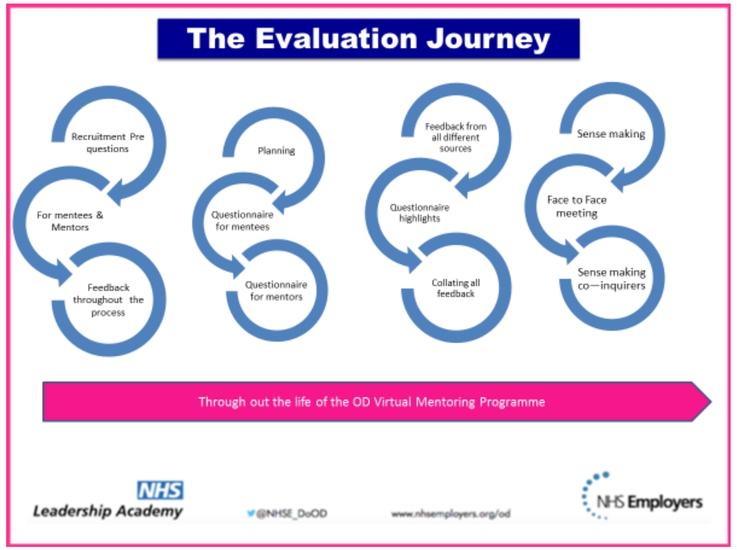
What have we got?

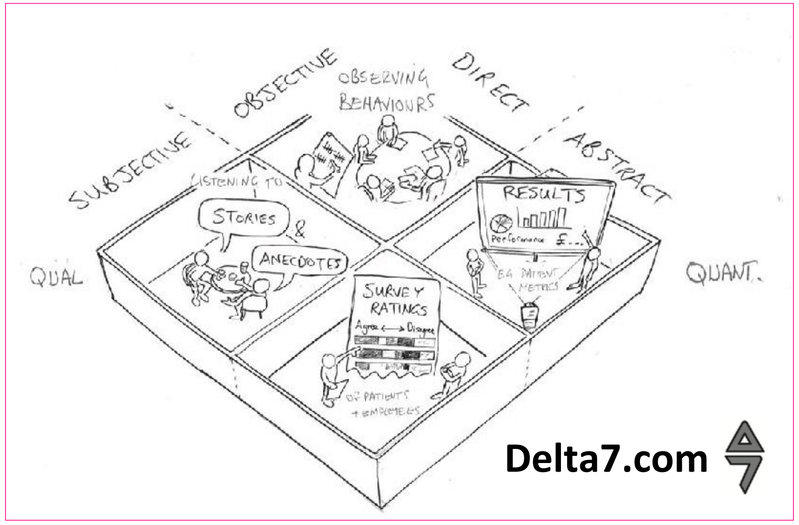
- High complexity
- Looking at a system of activity
- Mix of development, assurance and utilisation of OD capability
- Mixed evaluation methodology already in place

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

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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

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Data: existing programme evaluations

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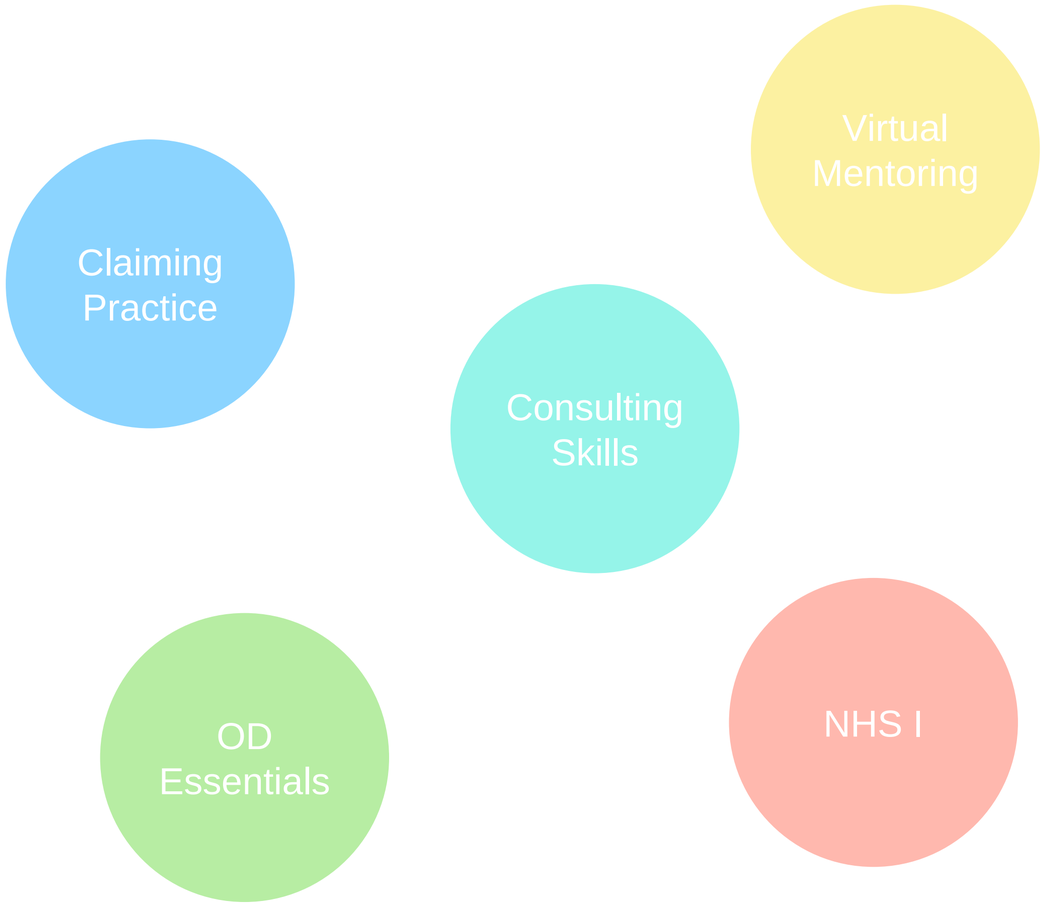

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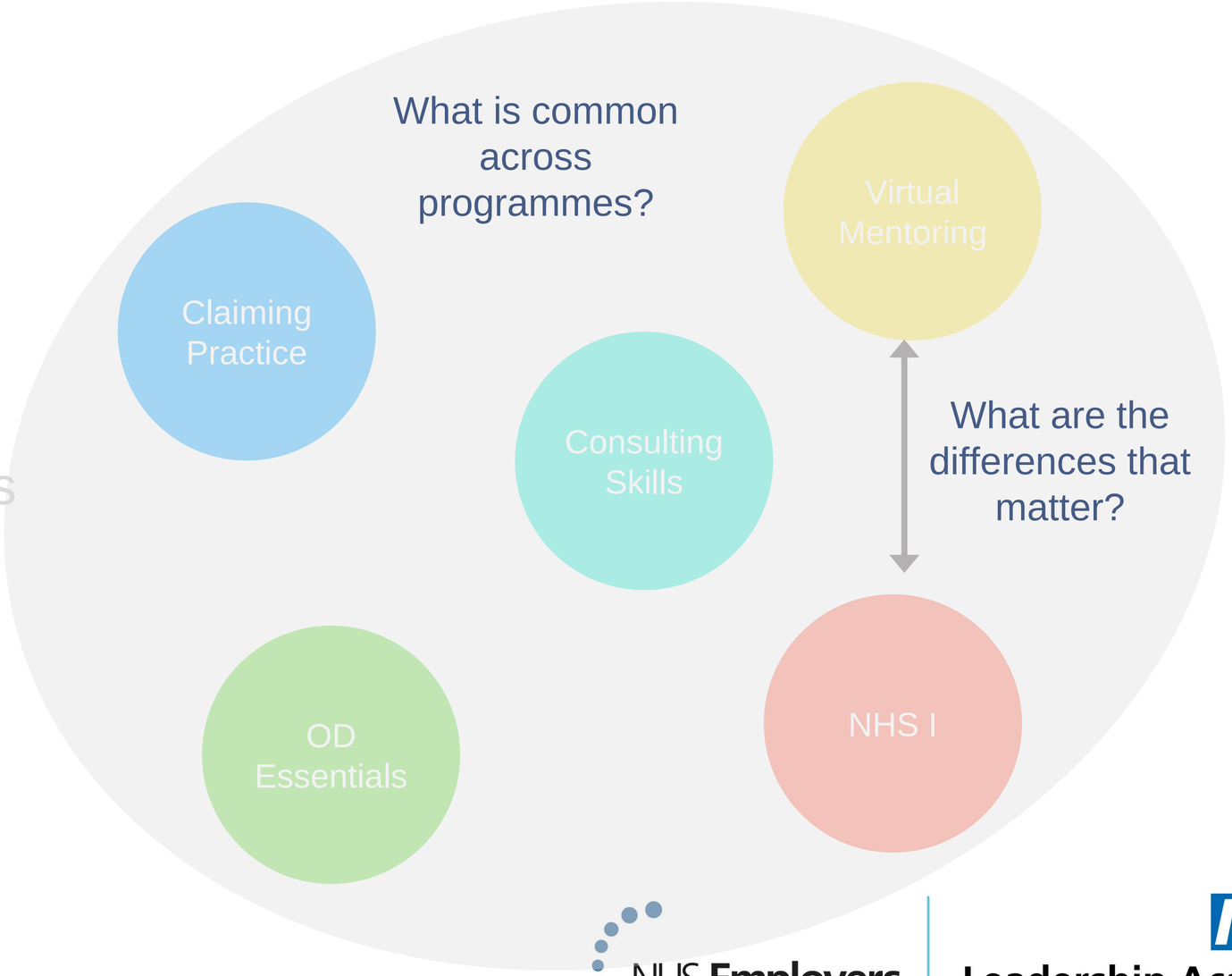

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HSD models & methods used in this step

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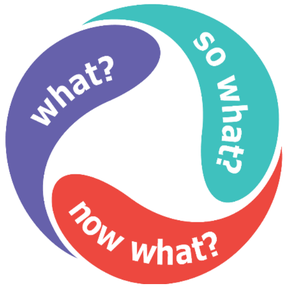


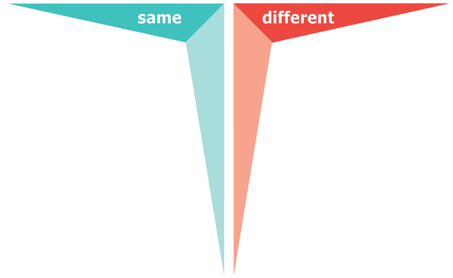
CDE Portrait—Pattern Logic

Containers	Differences within	Exchanges within

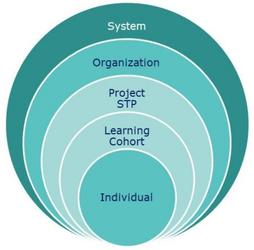
Pattern Spotters

- 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 . . .***

Same and Different



Whole, Part, Greater Whole System



Simple Rules

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Build models **from observed patterns!**

(Grounded Theory)

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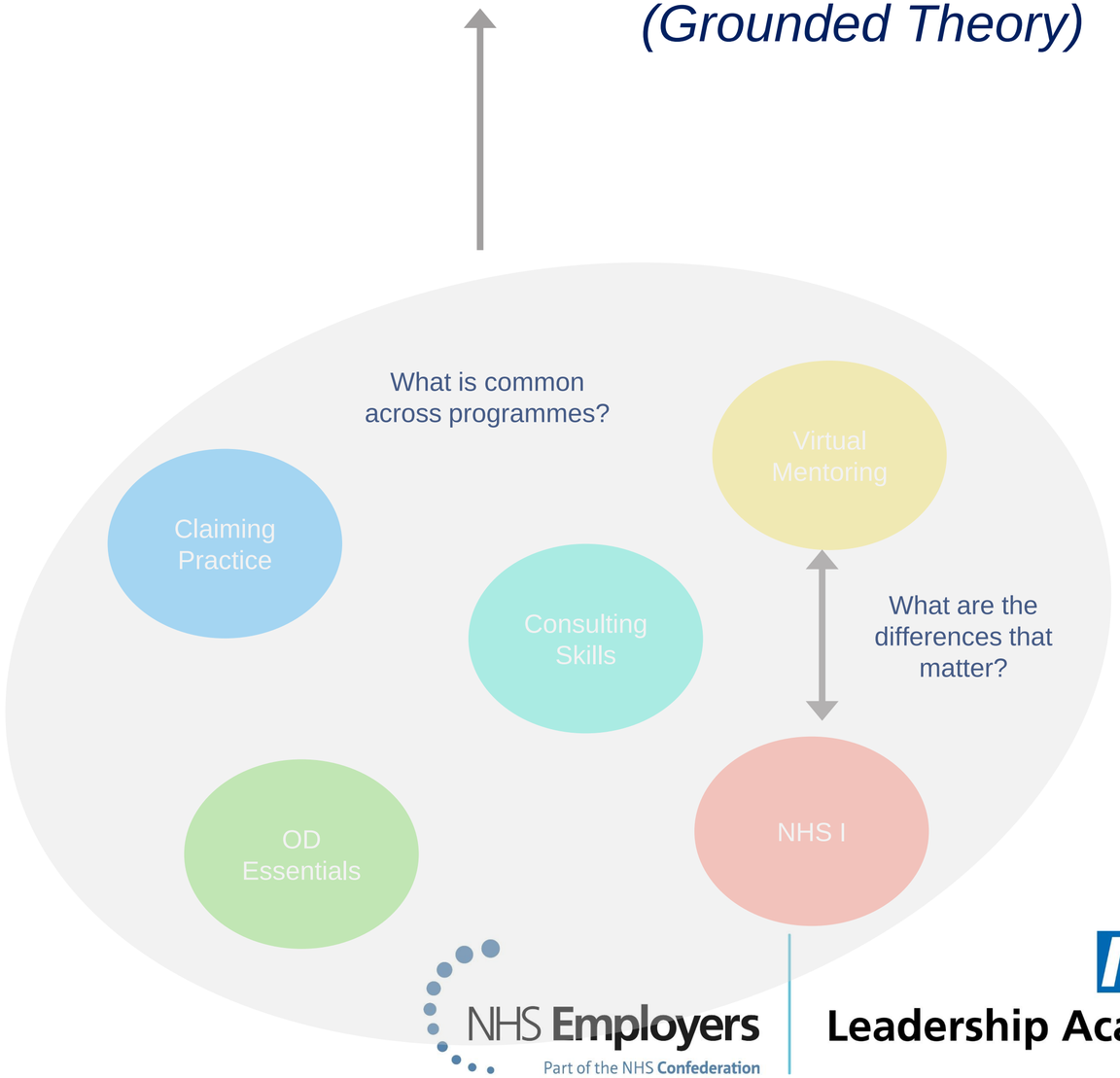

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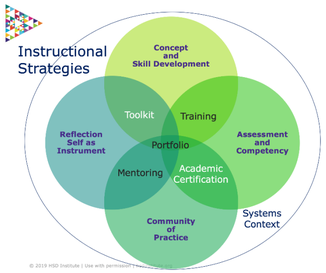
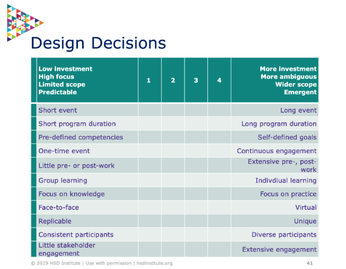


Instructional Strategies: approaches used in instructional design and programme components within them


Design Decisions

Low Investment High focus Limited scope Predictable	1	2	3	4	More Investment More ambiguous Wider scope Emergent
Short event					Long event
Short program duration					Long program duration
Pre-defined competencies					Self-defined goals
One-time event					Continuous engagement
Little pre- or post-work					Extensive pre-, post-work
Group learning					Individual learning
Focus on knowledge					Focus on practice
Face-to-face					Virtual
Replicable					Unique
Consistent participants					Diverse participants
Little stakeholder engagement					Extensive engagement

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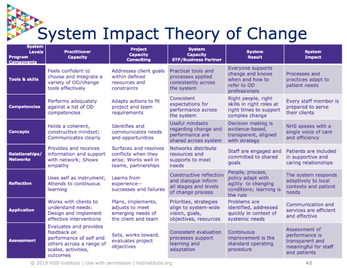
Design Decisions: key decisions in the design of an individual programme


System Impact Theory of Change

System Levels Program Components	Practitioner Capacity	Change Capacity Consulting	System Capacity ATP/Business Partner	System Reach	System Impact
Tools & skills	Feels confident to choose and integrate a variety of OD/change tools effectively	Addresses client goals within defined resources and constraints	Practical tools and processes applied consistently across the system	Everyone supports change and knows when and how to refer to OD professionals	Processes and practices adapt to patient needs
Competencies	Performs adequately against a list of OD competencies	Adapts actions to fit project and team requirements	Consistent expectations for performance across the system	Right people, right skills in right roles at right times to support complex change	Every staff member is prepared to serve their clients
Concepts	Holds a coherent, constructive mindset; Communicates clearly	Identifies and communicates needs and opportunities	Useful mindsets regarding change and performance are shared across system	Decision making is evidence-based, transparent, aligned with strategy	NHS speaks with a single voice of care and efficiency
Relationships/ Networks	Provides and receives feedback and support with network; Shows empathy	Surfaces and resolves conflicts as they arise; Works well in teams, partnerships	Networks distribute resources where supports to meet needs	Staff are engaged and committed to shared goals	Patients are included in supportive and caring relationships
Reflection	Uses self as instrument; Attends to continuous learning	Learns from experience—successes and failures	Constructive reflection and dialogue inform all stages and levels of change process	People, process, policy adapt with agility to changing conditions; learning is rapid	The system responds adaptively to local contexts and patient needs
Application	Works with clients to understand needs; Design and implement effective interventions	Plans, implements, adjusts to meet emerging needs of the client and team	Priorities, strategies align to system-wide vision, goals, objectives, resources	Problems are identified, addressed quickly in context of systemic needs	Communication and services are efficient and effective
Assessment	Evaluates and provides feedback on effectiveness of self and others across a range of scales, activities, outcomes	Sets, works toward, evaluates project objectives	Consistent evaluation practices support learning and adaptation	Continuous improvement is the standard operating procedure	Assessment of performance is transparent and meaningful for staff and patients

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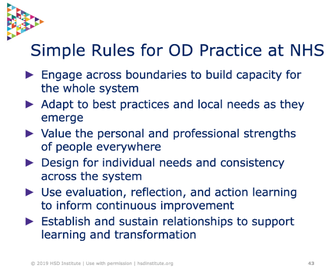
System Impact Model: how programme components map to system impact at different scales


Simple Rules for OD Practice at NHS

- Engage across boundaries to build capacity for the whole system
- Adapt to best practices and local needs as they emerge
- Value the personal and professional strengths of people everywhere
- Design for individual needs and consistency across the system
- Use evaluation, reflection, and action learning to inform continuous improvement
- Establish and sustain relationships to support learning and transformation

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Simple Rules: simple rules for OD practice in the NHS

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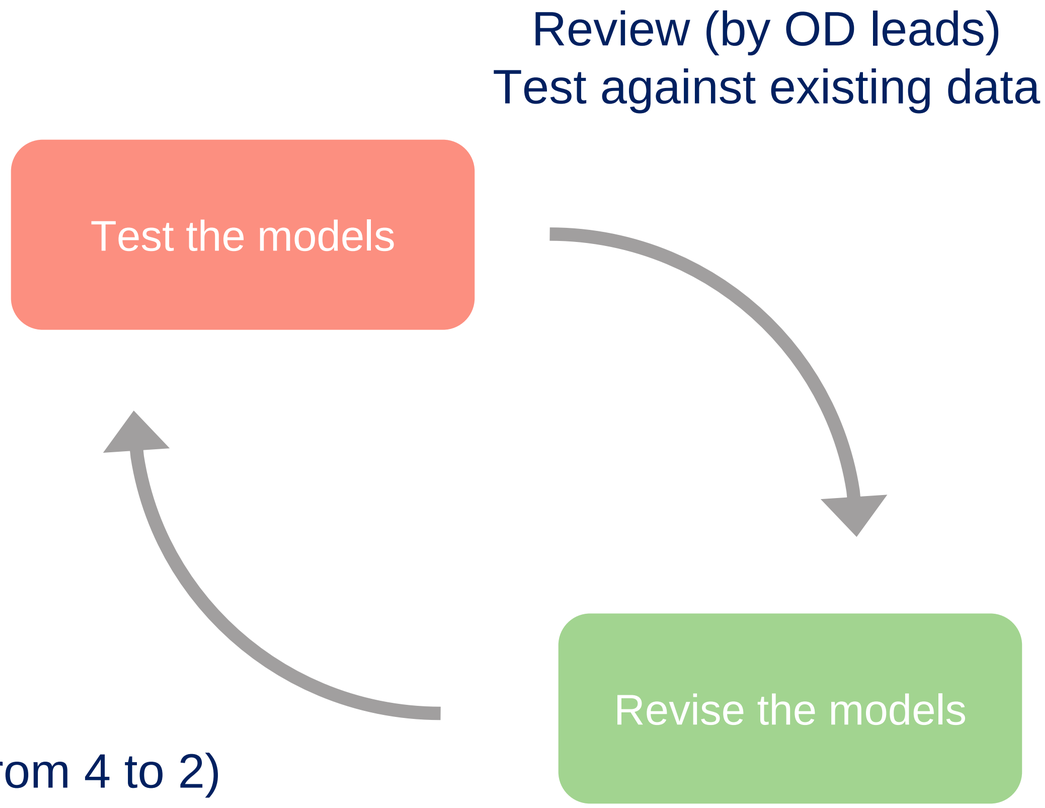

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- Who will use the evaluation outputs and how
- Scale and scope of the evaluation
- Process and timing
- Infrastructure and support

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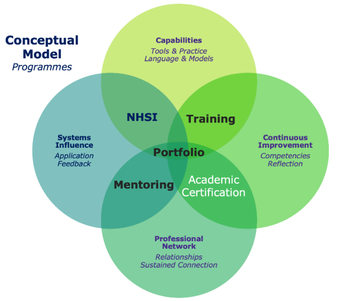

OD Professional Capability & Capacity Simple Rules	PD Programme Components	Levels of Systemic Impact		
		Practitioner Outcomes	Programme Outcomes	System Impact
Capabilities Adapt to best practices and local needs as they emerge	Tools & Practice	Feels confident to choose and integrate a variety of OD/change tools effectively	Introduces useful and evidence-base tools and models	Processes and practices adapt to best practices and patient needs
Value the personal and professional strengths of people everywhere	Competencies	Recognizes and works to perform OD competencies	Incorporates introduction, explanation, demonstration, practice, and feedback on competencies	Experiences effective interventions and desired outcomes from OD professionals
Professional Network Establish and sustain relationships across boundaries to support learning and transformation for all	Relationships	Provides and receives information and support; Shows empathy	Supports connections among participants and with others beyond the learning group	Patients are included in supportive and caring relationships
	Sustained connections	Accesses resources and other professionals to improve practice	Supports follow-up action and evaluation	Information flows efficiently and effectively across the system
Systems Influence Design for individual needs and consistency across the system	Application	Engages with clients to influence wellbeing and performance	Provides opportunities for application and practice	Change is supported and sustained in ways that meet local needs and resources
	Feedback	Seeks and responds to feedback from clients and other professionals	Provides feedback to learners and responds to feedback from learners	Solicits and responds to feedback from OD clients and patients
Continuous Improvement Action Research	Assessment	Reflects on personal capabilities and capacities to prove OD support	Provides opportunities and support for self-, peer-, and group assessment and feedback	Provides feedback on OD services and outcomes during and after interventions
Use evaluation, reflection, and action learning to inform worldwork improvement	Reflection	Uses self as instrument; Attends to continuous learning	Invites individual and group reflection before, during, and after programme	The system responds adaptively to local contexts and patient needs as they change

Process

Start evaluating!

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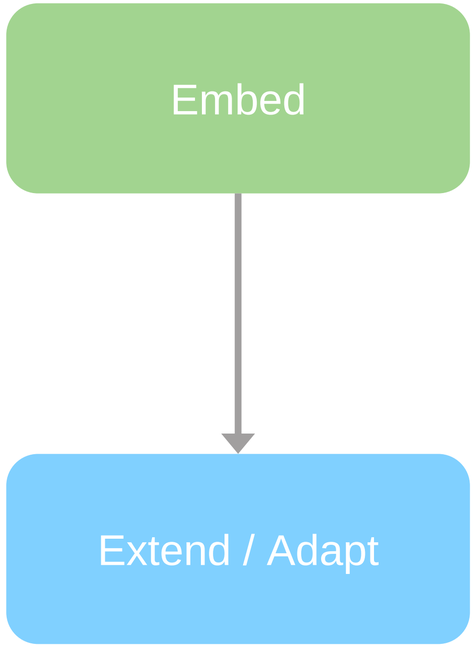

First embed as a live process, which builds capacity for objective decision-making about OD dev programmes.

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?

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