“In today’s world of artificial intelligence, quantum computing, and data analytics, we are on the cusp of demonstrating the central importance of OD interventions to the health and vitality of the systems we lead, consult, study, educate, and serve.”

What We Can Learn from Evaluating OD Interventions

The Paradox of Competing Demands

By Steve H. Cady and Joo-Hyung Kim

Unlike other capital investments, the value of learning appreciates, rather than depreciates.—Christopher Lee

The evaluation of OD interventions has never been more promising than in this era with the advancements of such tools as data analytics; yet it remains challenging for organizations to utilize a proper evaluation strategy. In this article, we begin by exploring the paradox of competing demands and then introduce a pragmatic model for selecting the optimal evaluation strategy by considering both the scope and rigor of analysis and leveraging the levels of evaluation from the field of training and development. We conclude with reflections on evaluation from the perspective of Gestalt OD Theory and collective consciousness.

In today’s world of artificial intelligence, quantum computing, and data analytics, we are on the cusp of demonstrating the central importance of OD interventions to the health and vitality of the systems we lead, consult, study, educate, and serve (Shah, Irani, & Sharif, 2017; Boje & Henderson, 2014). These advancements have enabled us to examine more readily how OD interventions positively impact the organization across multiple contexts and levels of analysis. For example, we are now capable of directly linking change processes to organizational performance (Pettigrew, Woodman, & Cameron, 2016). Further, this possibility does not stop with proving the importance of OD interventions. Evaluation tools enable us to learn from and tease out the nuances, and more specifically learn from interventions in order to improve them for future applications.

These conditions above have set the stage for an evolutionary leap in the field of OD (Kleiner, 2015; Laloux, 2014; Lawler & Worley, 2011). On a national level, the US department of labor predicts that behavioral science fields such as OD will be serving the fastest growing occupations (Career Trends, 2016). Likewise, the federal government has been supportive of the utility of behavioral sciences, as can be seen from the following statement: “Where federal policies have been designed to reflect behavioral science insights, they have substantially improved outcomes for the individuals, families, communities, and businesses those policies serve” (Presidential Executive Order, 2016, p.1).

While we are on the cusp of a new era, there are still challenges to be resolved. A successful evaluation of OD interventions is one of the difficulties many organizational practitioners and leaders confront.

The Paradox of Competing Demands

Assessing the efficacy of OD interventions can be elusive, because it is dependent on the required accuracy of analysis (Terborg, Howard, & Maxwell, 1980; Butler, Scott, & Edwards, 2003). The greater the required accuracy, the more rigorous and therefore more costly the design. It is this tension that describes the paradox of competing demands (Cady & Milz, 2015; Cady, Auger, & Foxon, 2010), which partly arises from the reality that you “can’t have your cake and eat it too.” The competing demands present a polarity of the purpose (i.e. prove and improve), and the cost (i.e. time and money).

Purpose: Prove and Improve

Proving Questions

- ❑ How many people are expected to be impacted by the intervention?
- ❑ Who is accountable for ensuring the intervention is implemented?
- ❑ Who else has the legal and governmental oversight?
- ❑ What were the political implications for the OD group and champions of the intervention?

The first dimension of prove and improve relates to the intended purpose of the intervention. OD professionals find themselves defending interventions, *proving* that the interventions had the intended impact and added value to the bottom line. The need for proof is about accountability for results, while making the business case to the skeptics. Because OD is considered to be based on the softer behavioral sciences, the role of evaluation can be undervalued and oversimplified. For example, it is easier to measure one’s blood pressure (hard science) than one’s attitude (soft science). Or, it is easier to measure cost savings from “right sizing” an organization, than it is to measure cost savings from a training initiative.

All the while, a core value of OD is to evaluate for the sake of learning, *improving* the intervention and leveraging its strengths. In other words, the second aim is to evaluate in order to improve the intervention and the organization for the future. This future focus is based on the desire to understand how interventions worked, identify the relatively important elements of the intervention, advance theories, and create more robust interventions.

Improving Questions

- ❑ How can the results inform us about future applications?
- ❑ Will the intervention be used in the future and, if so, how much?
- ❑ What are the uses for and scalability of the intervention for other settings?
- ❑ What is the expected impact on the wellbeing and culture of the organization?

In some cases, an accurate evaluation is necessary to determine whether the intervention should be continued or scaled for other settings (Kirkpatrick, 1998; Nielsen & Abildgaard, 2013). However, performing rigorous high quality evaluations of all interventions is not always practical, though it might appear ideal. It is a particularly relevant challenge when considering the competing paradox of time and money (Cady et al, 2010).

It is possible that the evaluation can be the largest item in the budget for an intervention. Therefore, if the financial cost associated with an evaluation is beyond expectation, it may lead the organization to decide against conducting any evaluation. Evaluation competencies are another consideration. As you move to higher levels of evaluation, the required sophistication often surpasses the expertise of those responsible for the intervention, requiring additional inputs such as training and outsourced professionals.

Cost: Time and Money

Conducting evaluations can be costly in terms of both time and money for all stakeholders involved. If either is too high, it is likely that the key decision makers will decide against conducting an evaluation altogether.

Time Questions

- ❑ What are the required details for the design, data collection, and reporting?
- ❑ What are the demands by leadership on the evaluation?
- ❑ Who needs to be included in and informed of the evaluation?
- ❑ How many competing interventions are currently being implemented?

In terms of *time*, leaders will need to pull people away from their typical tasks for evaluations, such as being interviewed, filling out surveys, and providing performance data. This opportunity cost is not always seen as a good use of time. Too often, surveys are filled out and go into the proverbial “black box,” never to be mentioned again. This lack of closing the loop is one of the biggest hindrances to getting reasonable response rates. Further, it erodes the trust of those impacted by the intervention, not to mention the loss of quality information, undermining the future applications of the intervention.

Money may be another major determinant of an evaluation strategy, especially when outcomes are difficult to measure. It is possible that the evaluation can be the largest item in the budget for an intervention. Therefore, if the financial cost associated with an evaluation is beyond expectation, it may lead the organization to decide against conducting any evaluation. Evaluation competencies are another consideration. As you move to higher levels of evaluation, the required sophistication often surpasses the expertise of those responsible for the intervention (Cady & Milz, 2015; Cady et al, 2010), requiring additional inputs such as training and out sourced professionals.

Money Questions

- ❑ What are the intervention-related fees and staffing costs?
- ❑ How much are the opportunity costs from doing or not doing the evaluation?
- ❑ What are the technology, software, materials, and logistical requirements?
- ❑ How much of the intervention's budget has been allocated for the evaluation?

You Can't Have Your Cake, and Eat It Too

The competing demand comes from the desire to prove the effect of an intervention and improve it while minimizing the associated costs. Although a focus on the proving and improving of an intervention may result in better outcomes, it will cost more in terms of time and money (see *Figure 1*). In this case, how do you find the optimal point that balances the polarity of the benefits and costs?

You can choose a costly evaluation that bears important implications for the organization or community. If there is a long-term implementation plan for the intervention, the intended impact is likely vital to the future; further, demonstrating results in an objective fashion may be necessary for continued funding. However, there are also cases where a costly evaluation is not plausible or desirable.

There may be no time or budget allocated to the evaluation because evaluations are often reactionary and not given enough planning. For example, the whole evaluation process might begin with a leader simply saying, "Did that program work . . . can you confirm that it was worth our time and money . . . are we better off . . . we are not done, right . . . oh, by the way, can you provide an update focused on these questions at our meeting next week?" Moreover, some believe that funds would be better spent on additional interventions or even argue that evaluations are just a bureaucratic mechanism for show. The perception is that the outcomes of the process are so obvious that it is not necessary to conduct an evaluation (Cady & Milz, 2015; Cady et al, 2010). In this case, you can choose a less rigorous approach that will not only give you some general guidance for the intervention but also help persuade the skeptics about the need for an evaluation.

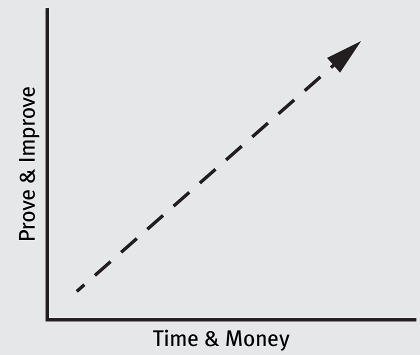

Figure 1. The Paradox of Competing Demands in Evaluating OD Interventions

Selecting an Evaluation Strategy

Evaluations can take place at a single level or across multiple levels, and this is often determined by the tradeoff of the competing demands. This multi-level nature of evaluations has been originally adopted in the field of training and development, based on two prominent models: Kirkpatrick's Levels of Evaluation (1998) and Phillips' Return on Investment (1996). As shown in *Table 1*, there are five levels

Table 1: *Levels of Evaluation with Low and High Rigor Options*

Level	Focus	High Rigor Example	Low Rigor Example
I	Attitude: How satisfied are people?	A validated survey with established reliability measures and limited open-ended questions for qualitative analysis.	Three questions on a flip chart with a couple of them scaled and a third open-ended question.
II	Knowledge: What do people know?	Administer a test that addresses key concepts, information, and policies related to the initiative.	Ask questions in an open forum about the key aspects of the initiative and make notes of what you hear.
III	Behavior: What are people doing?	Conduct behavioral observations of people; identify the frequencies of specific desired behaviors related to the initiative.	Administer a short questionnaire asking people to self-report their actions (verbal assessment also acceptable).
IV	Impact: What has been achieved?	Compare specific key performance indicators before, during, and after the initiative has been implemented.	Gather reports from a short survey, emails, and meetings with examples of what has been achieved.
V	Return: How much money has been generated versus spent?	Conduct a formal ROI analysis with key personnel reporting on verified costs (e.g., waste, errors, and cycle time) and the financial gains from the intervention. Calculate a verifiable ROI. Provide documented examples of best practices.	Conduct a pseudo ROI analysis with key personnel reporting on estimated costs (e.g., waste, errors, and cycle time) and gains from the intervention. Calculate a SWAG (serious wild ass guess) ROI with anecdotal evidence.

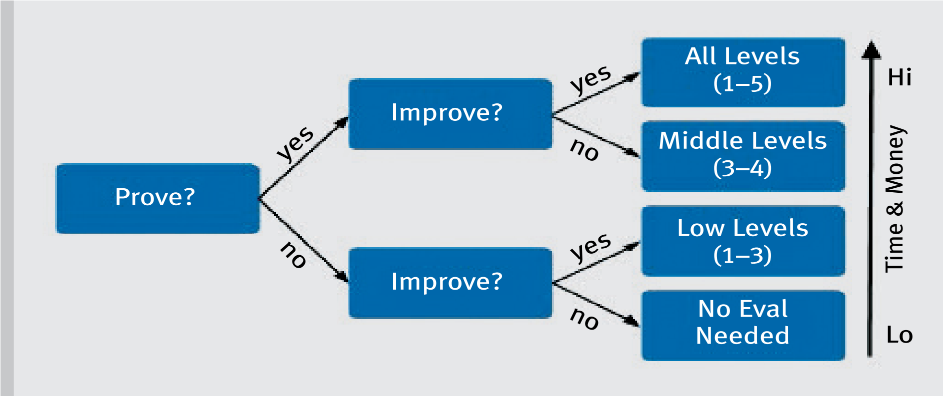

Figure 2. Evaluation Strategy Decision Tree

of evaluation that progress from assessing attitudes at Level I up to assessing the Return on Investment at Level V. Kirkpatrick's Evaluation Model was originally introduced in a trade journal, and was later published in his book titled *Evaluating Training Programs* (1975). Then, J.J. Phillips' (1997) built on the Kirkpatrick's model by adding a fifth level: the Return on Investment (ROI) framework. These two perspectives have been integrated and applied to a variety of change initiatives (Phillips, Phillips, & Ray, 2015; Russ-Eft et al., 2008), and we recommend that OD professionals include these approaches in their toolkit for the evaluation and intervention design process. The two frameworks will provide you with the common language that is often used throughout organizations among leaders and managers alike.

In *Figure 2*, we propose that you begin your evaluation design process with identifying the competing demand of purpose, namely the desire to prove and improve the intervention.

Then, ascertain the availability of time and money to implement the evaluation. *Figure 2* provides the options you can choose from with regard to the amount of rigor. For example, if you find yourself in need of both proving and improving the intervention, then it is recommended that you use all five levels of evaluation. If you have unlimited time and money, you are in a position to provide the highest level of rigor in your assessment. However, as we have discussed, this is typically not possible. While the tools for data analytics are available, the staffing and related analytical costs are still considerably high (BI-Survey.com, 2015; Microstrategy, 2014).

Rigor influences how formal and planned an evaluation is, thus impacting the validity and reliability of the results. In addition, the scope of the evaluation can change from examining the participants' experiences to verifying the intervention's impact on the organization. Next, we will walk through some scenarios using *Table 1* as a guide to help you decide the level of evaluation. Then, *Figure 2* provides further examples on the ways to conduct less rigorous evaluations when there are limitations on time and money.

Let's start with a scenario in which you want to both prove and improve a team-level mediation intervention. When conducting an evaluation with high rigor, the scope is the most invasive and extreme; it involves higher costs with a formal survey to assess reactions (Level 1), a test on the mediation model being used (Level 2), and the monitoring of the mediation practices utilized (Level 3). The evaluation also requires the evidence for supporting high-leverage improvements while also proving the degree of impact, such as the frequency of mediations (Level 4), and a well-documented ROI (Level 5). These measures attempt to answer the following questions, for example:

- How effective was the team mediation intervention?
- How can it be more effective?
- What difference has it made?
- What errors have been averted?
- How much cost has been saved?
- What revenues have been improved?

All five levels of evaluation are to be conducted in a formal and valid fashion by trained research professionals.

Now, let's consider a situation where you find yourself in need of proving whether the intervention worked as intended; however, you do not want to improve the intervention for the future. While the evaluation aims at assessing the changes in operations and behaviors, the focus is on the direct impact of the intervention. In the case of the team mediation intervention, this might involve assessing the mediation practices utilized (Level 3) and the number of mediations conducted or the amount of time to resolution (Level 4). These measures would be taken before, during, and after the intervention implementation.

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The lowest level of evaluation, before there is no evaluation required at all, is the scenario where you do not want to prove whether the intervention worked, yet you need to improve it for future applications. In this evaluation strategy, you would conduct Level 1, 2, and 3 evaluations. Here you examine the specific intervention's impact on individuals' perceptions and behaviors. For example, you might assess reactions to the team mediation (Level 1) and check if the mediation model has been properly understood (Level 2). You might use three questions on a flip chart to assess the satisfaction level, and ask them to write down the components of the mediation to check the learning outcomes.

Within all of these strategies, you may need to conduct a less rigorous evaluation providing a rough understanding of how to improve the intervention by gathering information with limited resources in a shorter time period. For example, you may walk around the organization taking note of changes, conduct an informal poll during a meeting, and seek personal inputs about the perceived impact of the intervention (*Table 1*). Leaders may be asked to estimate the approximate cost savings and revenue improvements, thereby estimating a pseudo-ROI.

Summary and Reflections

The process of evaluating interventions is about determining whether the path you are on has been the most effective strategy efficiently executed for the system you are in. In turn, this will influence how you move into the future. The fundamental premise of a good evaluation, as consistent with the principle of the Gestalt Theory of OD, is self-awareness on a large-scale. Self-awareness serves as the starting point of the whole energizing action cycle in the Gestalt Group Cycle (Zinker, 1980); to be able to figure out the future path, people and the whole systems must be aware of themselves. Likewise, as in the notion of collective consciousness, group awareness can act as a unifying force for taking ownership in determining how to move forward together (Tsoukalas, 2007).

The models presented here provide a framework for considering the competing demands and the trade-offs to be made. Developing an effective evaluation strategy is subtle, and grey areas are manifold. For example, imagine you are working on the decision tree model (*Figure 2*) and it suggests that an informal SWAG (serious wild ass guess) evaluation is the best option with Levels 4 and 5, because time and money are limited. Is this "bad"? We say "no." The reason is two-fold. First, getting leaders to slow down and think through the questions necessary to evaluate an OD intervention is important. For example, a venture capitalist conducts valuations using internal rates of return (IRR), which are based on critical assumptions. The value of these investments often dwarfs the costs of most OD interventions; and, it is interesting to note that IRR calculations are made with some SWAG. Similarly, engaging leaders in the analysis of the intervention's impact is about creating conscious and more mindful decisions on the ways to improve the organization. Second, if the leaders paying for the intervention get feedback from credible peers that the intervention resulted in a meaningful return on the investment, they will deem the feedback a valid data point. While this belief is a perception, it is helpful to know key stakeholders' collective reality in order to figure out the next steps for organizational change efforts. In short, evaluations do not happen in a perfect world; there are always compromises that must be made.

The bottom line is this: if you can achieve the intended purpose of the evaluation, then you have found the balance with the paradox of competing demands. You may find that your desired evaluation strategy differs significantly from those you are serving. As a result, go back to the drawing board and rethink what is most important to you, which may require renegotiating expectations with key leaders and other stakeholders.

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In closing, the evaluation of OD interventions supports the development of a learning organization, and this is where a consultant as an intervener can play an important role in helping the organization in service or disservice of itself. In providing the system with a better understanding of itself through rigorous evaluations, the system will change its thinking paradigm and move toward a more intentional way of self-organizing (Nevis, 2013). When the system begins to change its thinking paradigm, the learning has begun and "action learning" occurs. This shift in thinking and learning is what will lead to new organizational habits that result in long-term sustainability.

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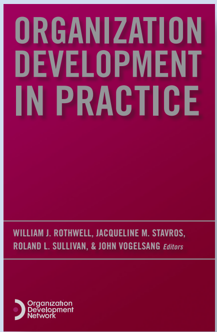

Organization Development in Practice

Editors
William J. Rothwell, Jacqueline M. Stavros,
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Organization Development Network

OD Practitioner

Journal of the Organization Development Network

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- Avoids jargon and overly formal expressions
- Avoids self-promotion

If the article is accepted for publication, the author will receive a PDF proof of the article for final approval before publication. At this stage the author may make only minor changes to the text. After publication, the Editor will send the author a PDF of the article and of the complete issue of *ODP* in which the article appears.

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Guidelines for Authors (contd.)

Preparing the Article for Submission

Article Length
Articles are usually 4,000 – 5,000 words.

Citations and References
The *ODP* follows the guidelines of the *American Psychological Association Publication Manual* (6th edition). This style uses parenthetical reference citations within the text and full references at the end of the article. Please include the DOI (digital object identifier; *http://www.apastyle.org/learn/faqs/what-is-doi.aspx*), if available, with references for articles in a periodical.

Graphics
Graphics that enhance an article are encouraged. The *ODP* reserves the right to resize graphics when necessary. The graphics should be in a program that allows editing. We prefer graphics to match the *ODP*'s three-, two-, or one-column, half-page or full-page formats. If authors have questions or concerns about graphics or computer art, please contact the Editor.

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Policy on Self-Promotion
Although publication in the *ODP* is a way of letting the OD community know about an author's work, and is therefore good publicity, the purpose of the *ODP* is to exchange ideas and information. Consequently, it is the policy of the OD Network to not accept articles that are primarily for the purpose of marketing or advertising an author's practice.

Submission Deadlines
Authors should email articles to the editor, John Vogelsang, at *jvogelsang@earthlink.net*. The deadlines for submitting articles are as follow: **October 1** for the winter issue; **January 1** for the spring issue; **April 1** for the summer issue; and **July 1** for the fall issue.

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