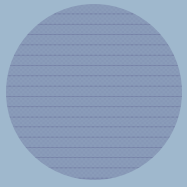




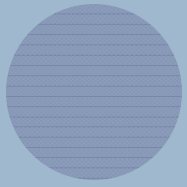
EVALUATING ORGANIZATIONAL EFFECTIVENESS: A NEW PERSPECTIVE

Wes Martz, Ph.D.
Vice President, Marketing
Kadant Inc.



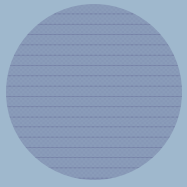
AN ENIGMA

- ◎ Organizations are an indispensable artifact of modern society
- ◎ Organizational effectiveness (OE) is of central importance
- ◎ Emphasis on organizational dissimilarities
- ◎ Fragmented conceptualizations of OE



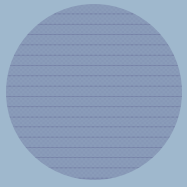
THE PROBLEM

- ⊙ No common theoretical framework
- ⊙ Inconsistent level of analysis
- ⊙ Limited ability to make comparisons
- ⊙ High degree of ambiguity
- ⊙ Lack of ethical considerations

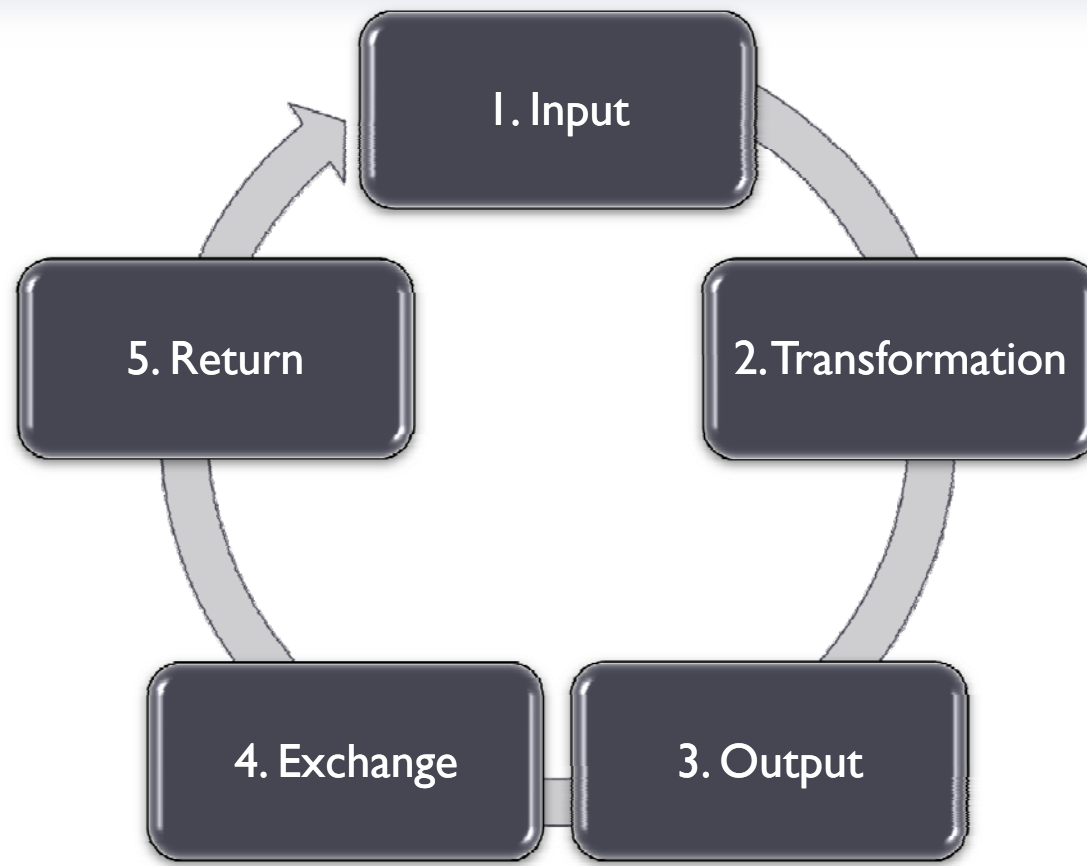


A NEW PERSPECTIVE

- ⊙ Develop an explicit process for evaluating OE
- ⊙ Introduce evaluation logic to organizational assessment
- ⊙ Integrate divergent perspectives on evaluating organizational effectiveness
- ⊙ Stimulate movement toward becoming evaluative organizations



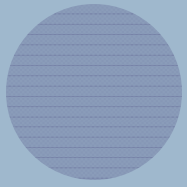
COMMON ORGANIZATIONAL FUNCTIONS IN AN OPEN-SYSTEM



ORGANIZATIONAL EFFECTIVENESS EVALUATION CHECKLIST (OEC)

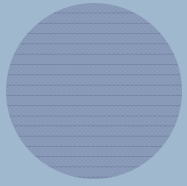


Download the checklist at www.EvaluativeOrganization.com



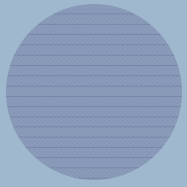
OVERVIEW OF THE OEC

- ⊙ Organizational evaluation process framework
- ⊙ Iterative, explicit, weakly sequential
- ⊙ 29 checkpoints grouped into six steps
- ⊙ Criteria of merit checklist
- ⊙ 12 universal criteria of merit
- ⊙ 84 suggested measures



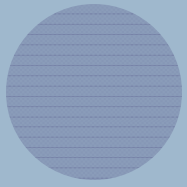
UNIVERSAL CRITERIA OF MERIT

- ⊙ Efficiency
- ⊙ Productivity
- ⊙ Stability
- ⊙ Innovation
- ⊙ Growth
- ⊙ Evaluative
- ⊙ Fiscal health
- ⊙ Output quality
- ⊙ Information management
- ⊙ Conflict-cohesion
- ⊙ Intra-organizational harms
- ⊙ Extra-organizational harms



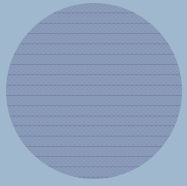
CRITERIA USED TO EVALUATE THE OEC

- ⊙ Applicability to full range of intended uses
- ⊙ Clarity
- ⊙ Comprehensiveness
- ⊙ Concreteness
- ⊙ Ease of use
- ⊙ Fairness
- ⊙ Parsimony
- ⊙ Pertinence to the content area



VALIDATION PROCESS

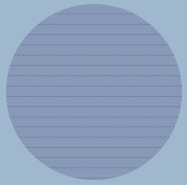
- ◎ Phase 1: Expert Panel
 - ◎ Critical feedback survey
 - ◎ Written comments directly on OEC
- ◎ Phase 2: Field Test
 - ◎ Evaluator perspectives
 - ◎ Client perspectives



EXPERT PANEL OVERVIEW

- ◎ Study participants
 - ◎ Subject matter experts (organizational and evaluation theorists)
 - ◎ Targeted users (professional evaluators, organizational consultants, managers)
- ◎ Review OEC for providing critical feedback
- ◎ Identify strengths, weaknesses, areas to improve

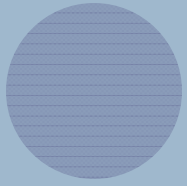




KEY FINDINGS

PHASE 1: EXPERT PANEL

- ⊙ Pertinent to content area
 - ⊙ Clear
 - ⊙ Fair
 - ⊙ Sound theory
- } • Content relevance
• Representativeness
• Substantive validity
- ⊙ Parsimony and ease of use were identified as areas to address




REVISIONS TO OEC

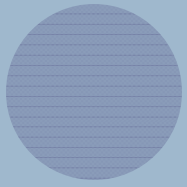
PHASE 1: EXPERT PANEL

- ⊙ Focused on parsimony and ease of use
- ⊙ Reduced number of steps to six
- ⊙ Restructured for efficiency, ease of use
- ⊙ Added examples, explicatory comments
- ⊙ Tips and guiding questions added to sidebar
- ⊙ Increased word count by 25%



FIELD TEST OVERVIEW

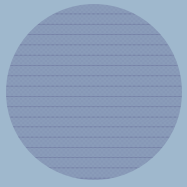
- ⦿ Evaluation Client
 - ⦿ For-profit organization based in the U.S.
 - ⦿ Stand-alone entity (e.g., not a division)
 - ⦿ Conduct evaluation using revised OEC
 - ⦿ Strictly follow OEC to ensure fidelity
 - ⦿ Post-evaluation semi-structured interview
- 



KEY FINDINGS

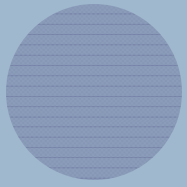
PHASE 2: FIELD TEST

- ⊙ Structured format minimized “scope-creep”
- ⊙ Identified several areas to clarify in OEC
- ⊙ Reinforced need for multiple measures, transparency in standards
- ⊙ Minimal disruption to the organization
- ⊙ Evaluative conclusions were credible, valid, and useful
- ⊙ High value placed on recommendations



RESEARCH LIMITATIONS

- ⊙ Few real-world applications
- ⊙ Single-case field study
- ⊙ Selection of the case study
- ⊙ Selection of the expert panel members



OEC VALUE SUMMARY

- ⊙ Professional evaluators
 - ⊙ Process framework to guide organizational evaluation
 - ⊙ Explicit and universal criteria of merit
- ⊙ Organizations
 - ⊙ Guidelines for conducting internal evaluations
 - ⊙ Comparisons of multiple divisions, programs
- ⊙ Theory and research
 - ⊙ Advances a common theoretical framework of OE
 - ⊙ Supports an emerging strand in evaluation discipline



wes.martz@gmail.com

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