

Impact Grid exercise – to explore Organisational Change

What is this?

The Impact Grid facilitates analysis of the relationship between organisational change and organisational development (OD) or Partner Capacity Development (PCD) interventions. It helps to deepen understanding about the effectiveness of the OD/PCD interventions and processes. It is an exercise which can be carried out during an interim review of progress or at the end of a pre-determined change period.

It uses a visual aid of two axes (Figure 1) to identify degree of change and degree of contribution made to that change by an intervention. Used in a participatory workshop, and drawing on evidence of changes gathered previously, the Impact Grid enables participants to reflect on both the significance of organisational changes *and* the degree and ways in which the OD/PCD process contributed to those changes.

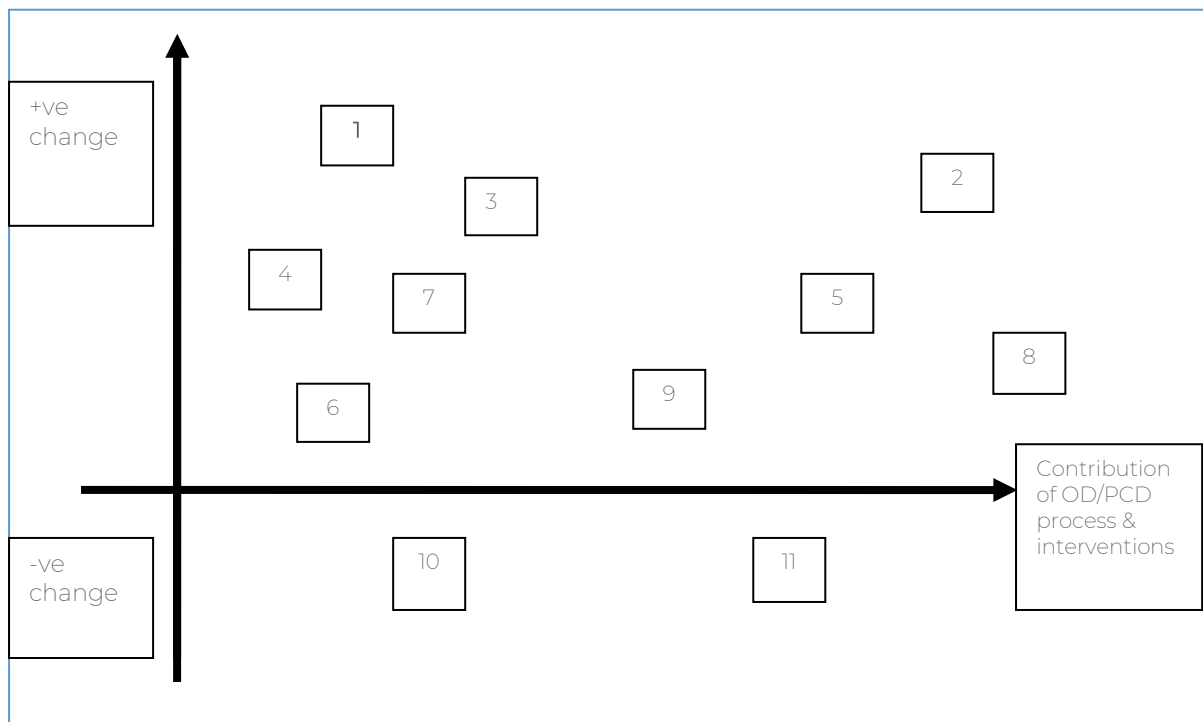


Figure 1: Impact Grid

Figure 1 shows the visual aid used in the exercise. The boxes with the numbers each represent a specific change identified by participants.

Key strengths

This exercise is highly relevant to the assessment of organisational change, particularly in facilitating a shared analysis of the significance of identified changes and the degree to which the efforts of the OD/PCD process contributed to those changes. It facilitates the identification of changes for different stakeholders both internally within the organisation and externally, as well as changes at any level (individual, team, organisation-wide).

The process of discussion about where to place each identified change is, in itself, a contribution to ongoing organisational development. The discussion builds deeper understanding of the organisation and its development through reflection, discussion and agreement about the significance of change and the usefulness of specific OD/PCD interventions.

The exercise also contributes to strengthening understanding about what type of evidence is most useful when undertaking the assessment of organisational change. This will emerge as participants are asked to provide examples of identified changes together with reasons for locating these along the vertical axis to illustrate degree of their significance for the organisation and its performance.

Example: Using the Impact Grid as part of a Case Study

We used the Impact Grid in a one and a half hour exercise which formed part of separate one-day workshops held with NGOs who were participating in a study on the impact of OD support services provided to them by their umbrella organisation. The workshops were held in the early phase of the one-year study, and the organisations had been engaging in different ways and time frames with the support services. During the workshop, in addition to the Grid exercise we used a variety of data gathering methods including timelines, visioning exercises, group discussions and semi-structured interviews.

There were rich discussions about the significance of the organisational changes that the participants identified; aided in each case by the challenge of deciding where on the vertical axis (degree of significance) the change should be located. The discussions were equally fruitful when it came to the location of the change along the horizontal axis (degree of contribution made by the services).

The resulting picture gave a flavour of how the organisational support services had played different types of roles – at times being the key catalyst for change, and at other times providing further reinforcement to changes that were already underway. There was much to reflect upon, and with more time available we could have delved a lot deeper into the factors that influenced those different contributions.

Process

Impact Grid is a participatory exercise which can take approximately 2-3 hours:

Materials:

- Cards or post-its
- 4 sheets of flipchart paper

Preparation:

Stick the 4 sheets up on the wall, to form a large square. Draw the vertical and horizontal lines that form the grid, writing the names of each line as in the diagram above.

Step 1: Identify changes in relation to the situation before the OD/PCD process

Individual or small group work identifies changes which are written on cards/post-its, specifying what exactly has changed and for whom. Ideally, evidence sources should be noted down.

The following instructions for this are as below (the key points in bold below should be written on a flipchart):

“Think about the needs identified (or the situation that existed) at the beginning of the OD/PCD process. What has changed?”

Please be specific – we want to know what exactly has changed for whom

We are looking for evidence of change at all levels – individual, small groups (e.g. programme staff); organisational. There may also have been changes noted for Country office staff (if relevant) or partners.. or networks.. or others... Please cite these too

For each change, use a separate card and write down the specific stakeholder group and a brief description of the change that you have identified

Step 2: Assess the significance of identified changes and the contribution made by the OD/PCD process and its interventions.

In plenary, the positioning of each card/post-it is discussed. The simplest use of the vertical axis is to show degree of positive/negative change (as per the visual aid above). It is also possible to do this exercise by using the vertical axis to show significance of the change in terms of overall impact for the organisation and its performance. Criteria can be established for this e.g. in terms of the OECD criteria of relevance, effectiveness, efficiency, sustainability. The horizontal axis is used to illustrate degree of contribution made by the OD/PCD process to the identified changes.

Thus, this step in detail - in plenary:

Each participant in turn to place their card on the appropriate place on the grid.

The participant reads out their card – explaining a bit more about it if necessary. They then decide where to place it. If it is a positive or significant change, it goes above the horizontal line - the higher up, the more positive or significant. If the card describes an adverse change, then it is placed below the line.

The participant also decides how far to the right or left it is placed. The extreme right side means that they assess that the change would not have happened if it had not been for the specific OD/PCD intervention or the whole process itself. Placing the card towards the left indicates that the participant assesses a small or negligent contribution by the OD/PCD intervention.

After the participant has placed their card, other members of the group have an opportunity to suggest a different location (e.g. more to the left or right).

If the participant agrees they can relocate the card, but if they disagree then it remains in its original position. In other words, it is the participant who has the final word on where their card is located.

This process continues until all participants have located their cards.

Step 3: Identify stronger and weaker OD/PCD interventions:

Once all the cards are placed, it is useful to reflect upon whether any particular activities or interventions played a greater contribution than others; and which, if any, failed to make expected changes or even generated negative change.

This step in detail:

Ask the participants the following question:

“Look at where you have placed your cards and think about the types of activities and interventions that took place. Do any of them stand out as having been particularly effective in contributing to change?”

Were there other contributing actors/factors which made it more effective than others? If so, what were they?

Were there activities that failed to make changes as expected? Why?

(Note to facilitators: Record answers on flip chart)

Step 4 (optional but recommended) Assess the soundness of the evidence

It may be felt to be important to document the levels of confidence the participants (and facilitator) has in reported findings.

In detail:

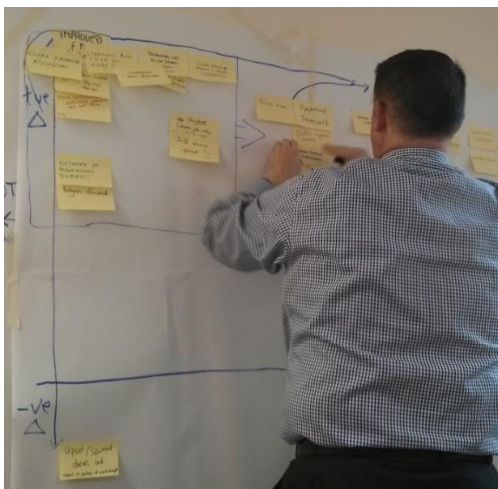
Revisit each of the recorded changes and ask the simple question:

How do you know about this change?

Continue with this line of question (for example, by asking how many people said something; or where it was recorded/who recorded it) until you agree how robust the evidence is.

(Note to facilitators: If the evidence comes from one source, it should be classed as “anecdotal” (A); if two different sources, it should be classed as “some supporting evidence” (SSE); if three or more, it can be considered “reliable evidence” (RE)

Once agreed, add the appropriate letters to the specific cards)



Step 5: Analyse linkages

It is useful to consider whether there are connections between different changes that are identified, as this can both examine the initial planning logic (especially the thoughts about sequencing change interventions) and simultaneously draw out connections across levels of change (outcome-impact levels).

These can be illustrated through the use of arrows between cards and speech bubble post-its to describe the link.

Step 6: Catch the surprising and unexpected

A final step is to ensure that all the important and relevant information is captured.

This can take place in pairs, small groups or plenary, with participants asked to identify if there are elements that have not been captured well enough or at all. These should be noted down on a separate flipchart.

Key Considerations

Preparation before the workshop would be advisable (although not absolutely necessary) – to review documentation and identify examples of change. This would make the use of workshop time more valuable and enable the discussion to focus on analysis of significance and contribution, rather than on identification of the changes themselves.

It is advisable to ensure a cross-representation of stakeholders in the workshop.