



**INTERACTIVE EVALUATION
MANAGEMENT PROCESS AS A
COMPLEMENTARY EVALUATION
METHODOLOGY TO ANALYSE
ORGANISATIONS**

PRESENTATION

I. Introduction

- Theoretical work
- Practical work

II. Interactive Evaluation Management Process (IEMP)

- IEMP definition
- Evaluation Methodologies to be considered in the IEMP

III. Relevant steps in an effective IEMP as a framework to support the evaluation methodologies

- Strategy implementation
- Strategy formulation
- Strategy measure

PRESENTATION

IV. The importance of indicators in the IEMP

- Indicators definition using the IEMP
- Measurement of Indicators

V. Organisations improvements through IEMP

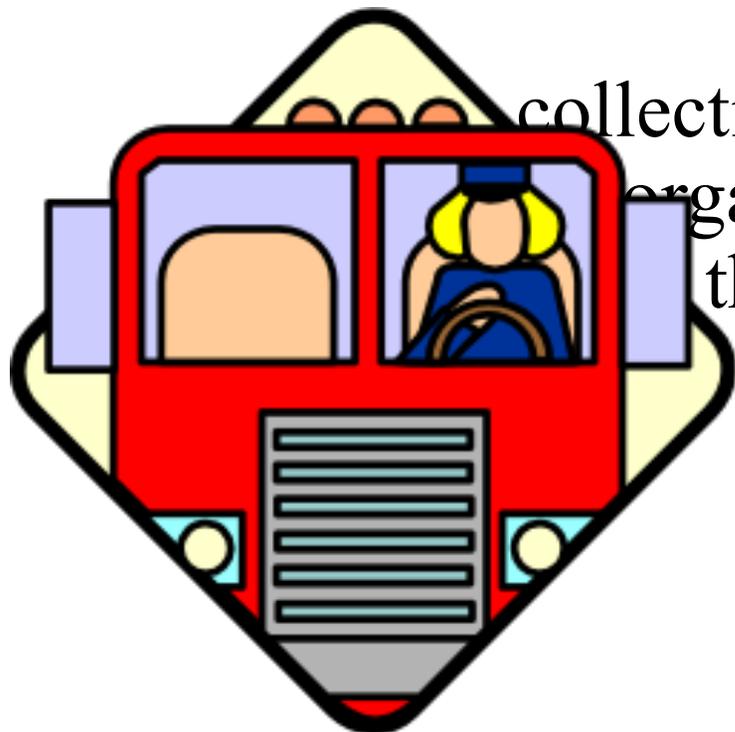
VI. Discussion



I. INTRODUCTION

INTRODUCTION

- Theoretical Work: Using relevant literature for evaluation
- Practical Work: Theories derived from observations in practice



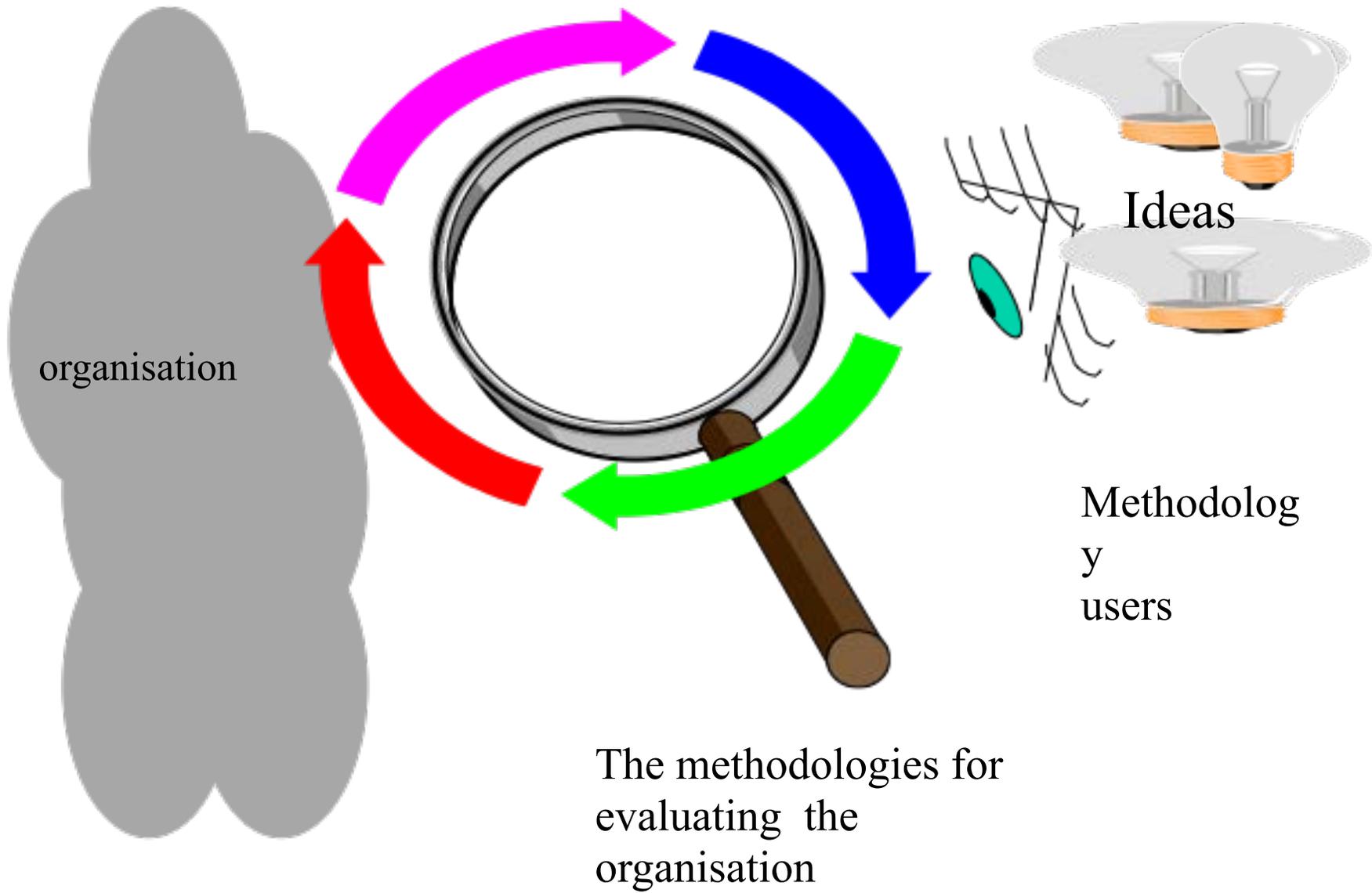
collection using various
organisation in order
the application of different evaluation
approaches

THEORETICAL WORK:

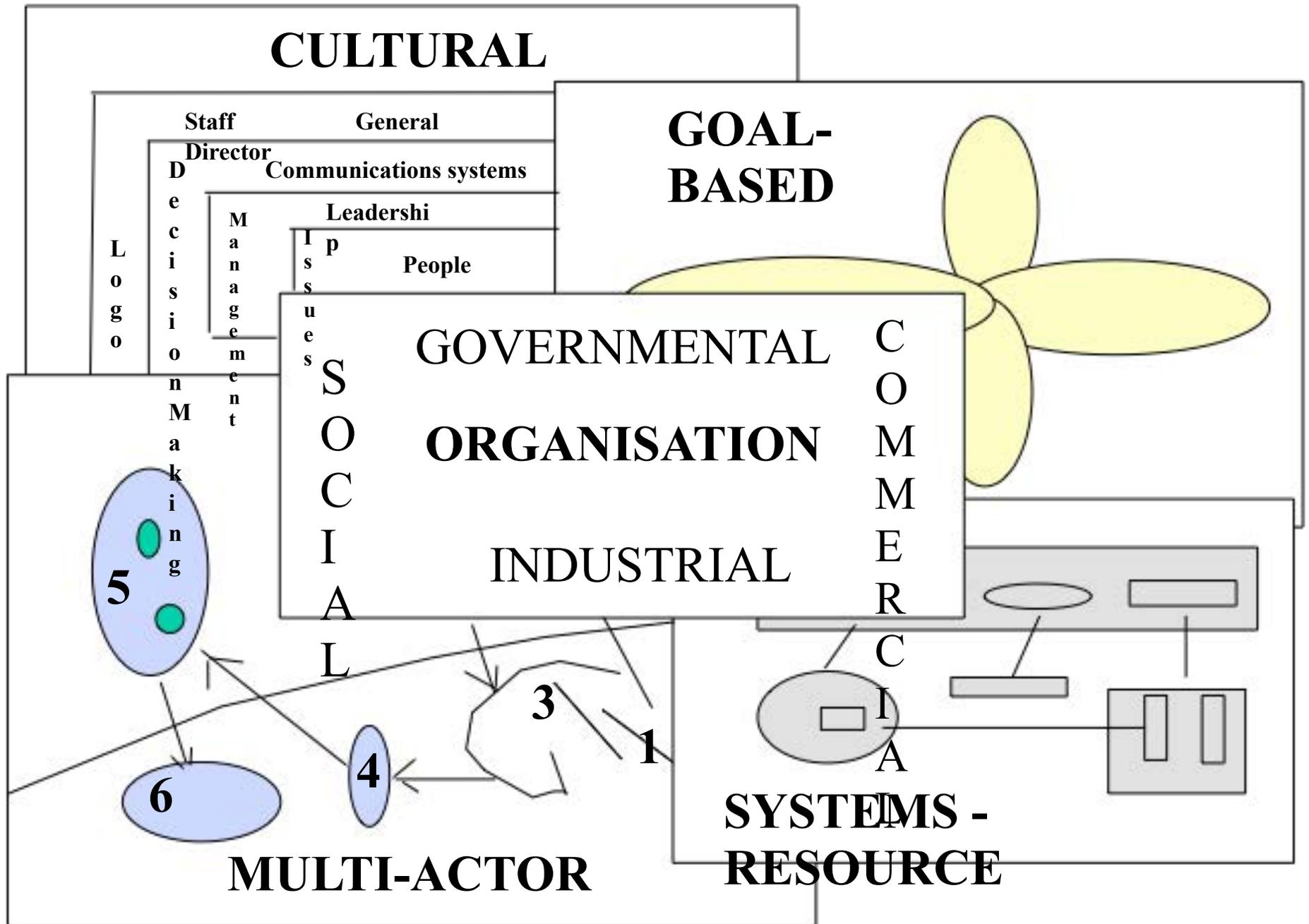
According to Gregory and Jackson, there are different forms of evaluation:

- Goal-Based approach
- Systems Resource-Based approach
- Multi-actor Based approach





The perceived world

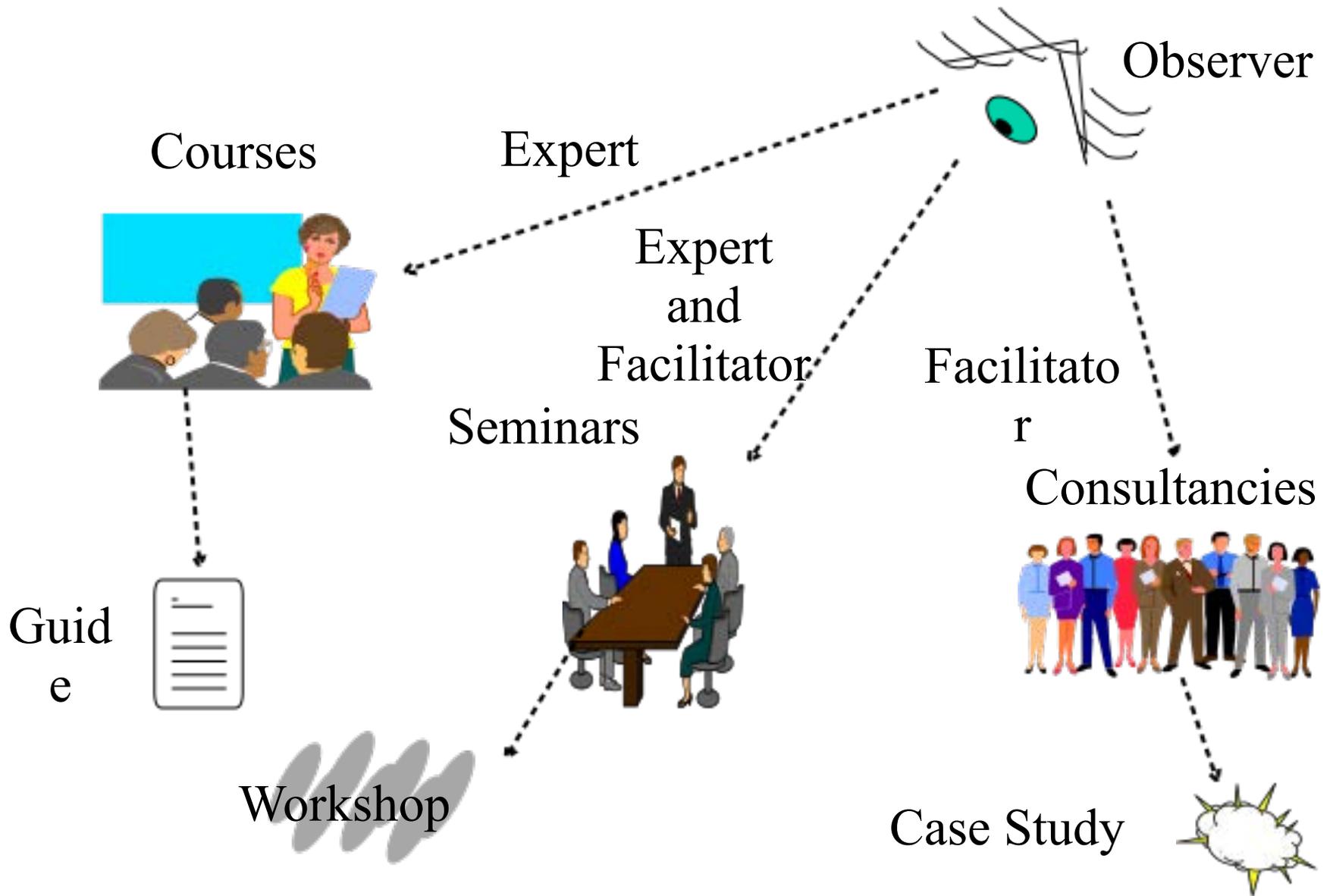


PRACTICAL WORK

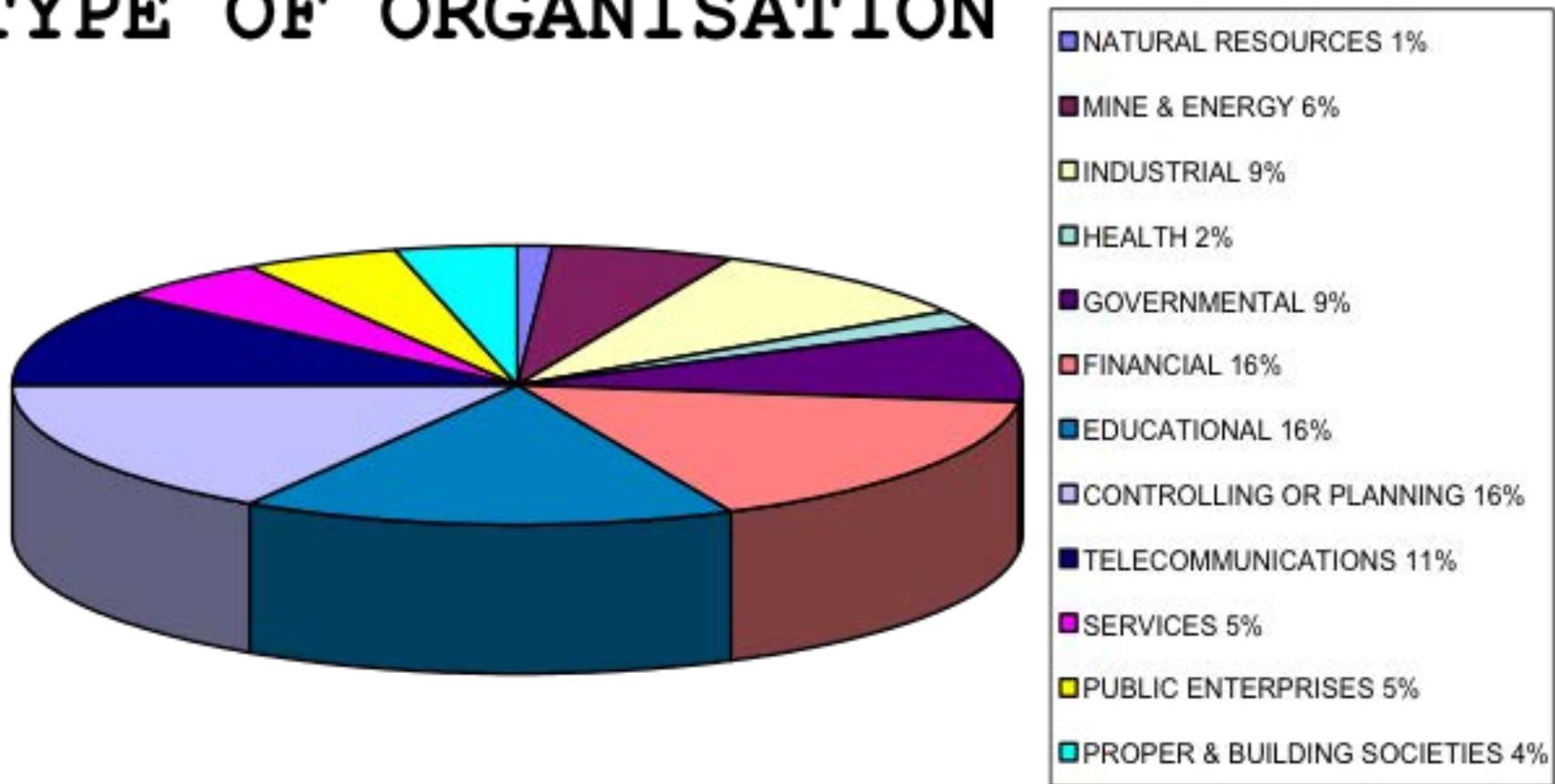
- Types of organisations chosen:
 - Formal organisations
 - Governmental or Social organisations
 - Controller organisations
 - Planning Office

- How to approach these organisations:
 - Courses
 - Seminars: theoretical-practical
 - Consultancy work





TYPE OF ORGANISATION



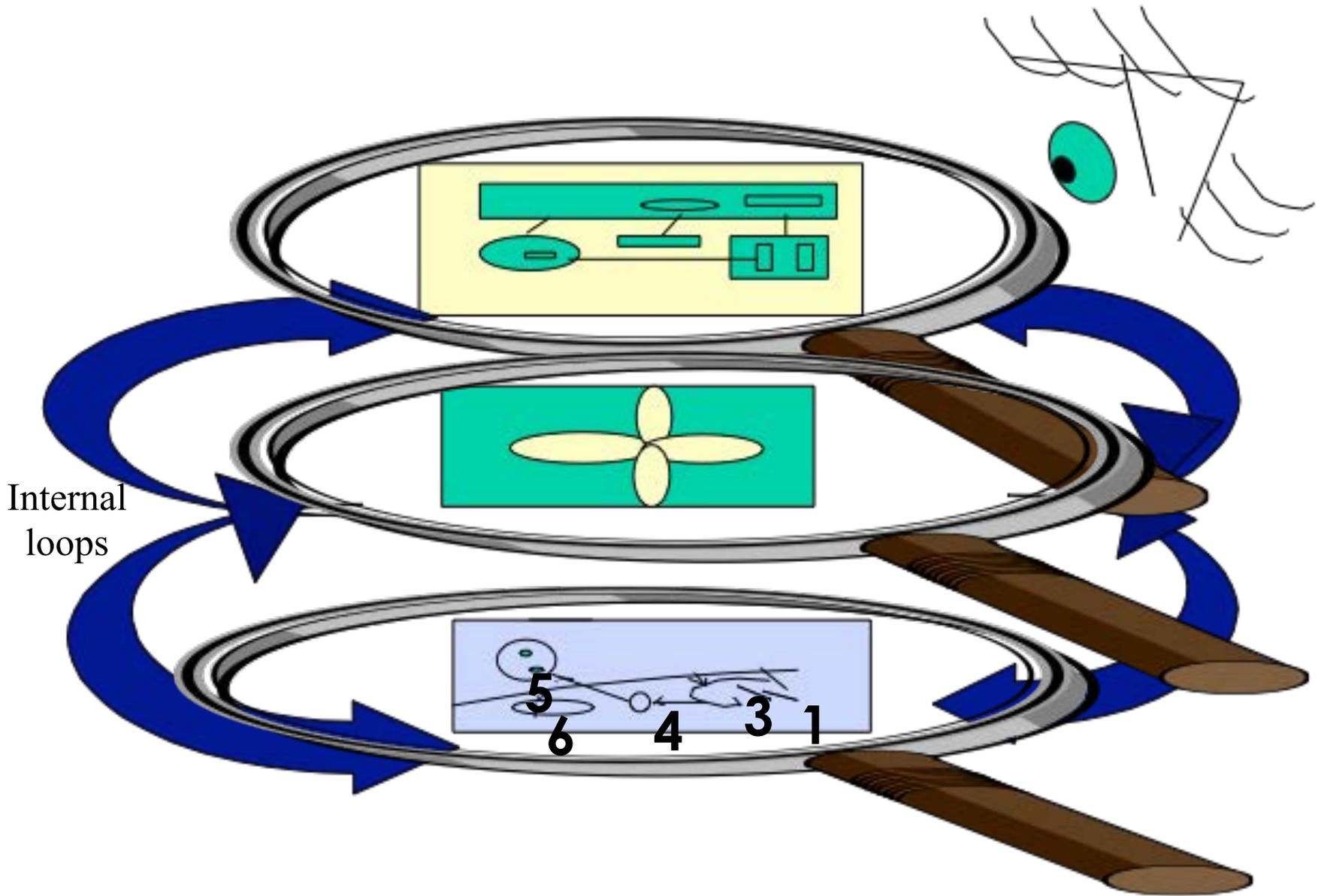
Total executives included in the Pilot Project = 888



II. INTERACTIVE EVALUATION MANAGEMENT PROCESS (IEMP)

Interactive Evaluation Management Process

- It is a dynamic measurement of organisational effectiveness focuses on external and internal loops to achieve organisational improvement
- It is a heuristic method that enables one to formulate, to develop, to implement and to measure strategies



Internal loops

GOAL- BASED

Evaluation Methodology based upon the idea that	The organisation sets formal or operational goals
View of the organisation as a:	Machine seeking to achieve its goals with the minimum use of resources
Suggested Systems-Approach	Interactive Management which provides a process for deciding on objectives, strategy and mission, and gives rise to criteria for measurement
Effectiveness	Is the organisation's ability to achieve its goals

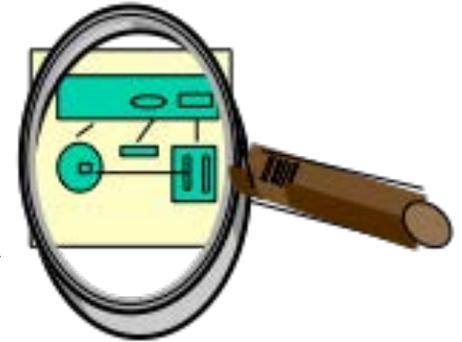


- a. Define the objectives
- b. For each objective define process, targets, and personnel responsible and also define:
 1. Process: How
 2. Targets: When
 3. Responsibility: Whom
 4. Quantify resources relevant in achieving the targets
 5. Identify constraints, restrictions and bottlenecks in the resources where relevant to targets
- c. Monitor and control actual objective performance with those defined in a, above.
- d. Based on the comparison, executives debate desirable and feasible change and actualize and define indicators.

SYSTEMS-RESOURCE

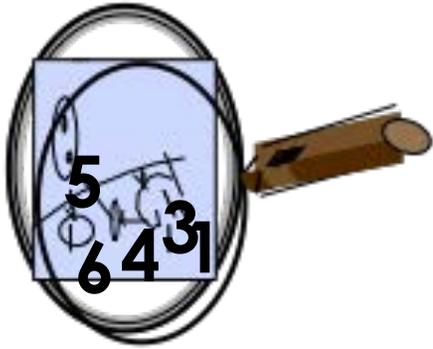
Evaluation Methodology based upon the idea that	The organisation is a coherent system which survives, adapts and develops in the environment
View of the organisation as a:	Adaptive system of interactive parts
Suggested Systems- Approach	Viable System Model which permits one to check that structures and processes ensure adaptability and effectiveness
Effectiveness	Is the organisation's ability to survive and adapt in a dynamic environment

- a. Identification of SBUs
- b. Understanding the Co-ordination Function in the organisation
- c. Understanding the Control Function in the organisation
- d. Understanding the Planning Function in the organisation
- e. Understanding the Policy Function in the organisation
- f. Conceptualizing the VSM for the whole organisation
- g. Using the VSM for diagnosis at each recursion level
- h. Analyzing the mechanisms of discretion and autonomy
- i. Identifying the relevant processes and different steps considered in each process for the organisation
- j. Identifying and adjusting the more relevant indicators
- k. Monitoring and controlling each process with those indicators defined
- l. Based on the comparison, executives debate desirable and feasible changes.

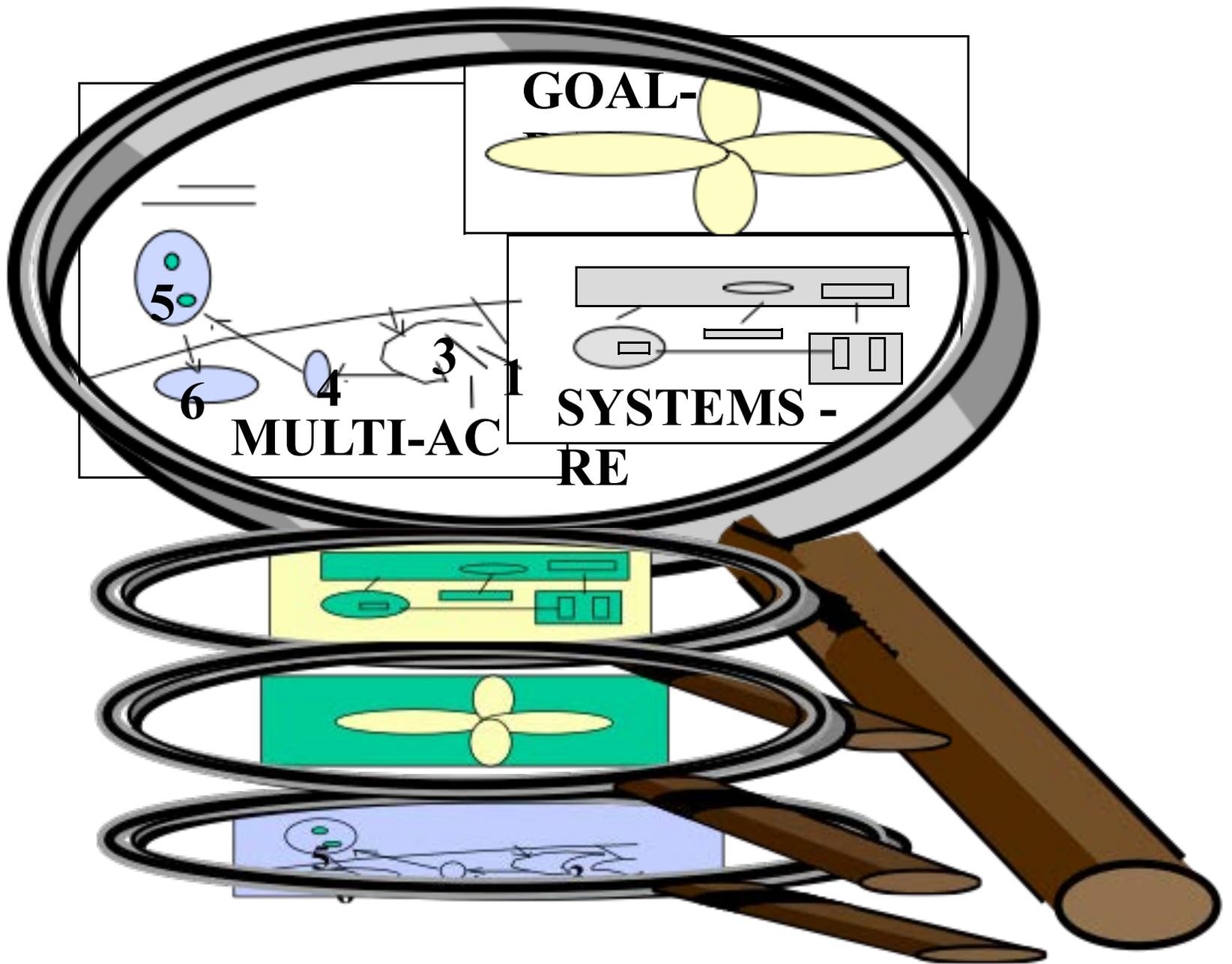


MULTI - ACTOR

Evaluation Methodology based upon the idea that	Satisfied actors and stakeholders are primarily responsible for organisational success
View of the organisation as a:	Pluralistic system. As a result of the interaction process, organisational social structure emerges
Suggested Systems-Approach	Soft Systems Methodology to reflect the views of what different individuals want from the organisation. The organisation is evaluated according to multi-actor criteria
Effectiveness	It is the organisation's ability to satisfy the needs of all those parties influenced by and having an influence upon its activities



- a. Involve clients (those persons who initiated the evaluation) in the drawing of rich pictures.
- b. Identify stakeholders from rich pictures.
- c. Interview stakeholders to find out about levels of satisfaction and ways in which organisation/group/undertaking might be improved.
- d. Construct root definitions and conceptual models based on stakeholders' suggestions for improvement.
- e. Reveal root definitions and conceptual models to stakeholders.
- f. Stakeholders compare actual systems and their performance with those expressed in the root definitions and conceptual models.
- g. Based on the comparison, stakeholders debate desirable and feasible change and design a plan for change.



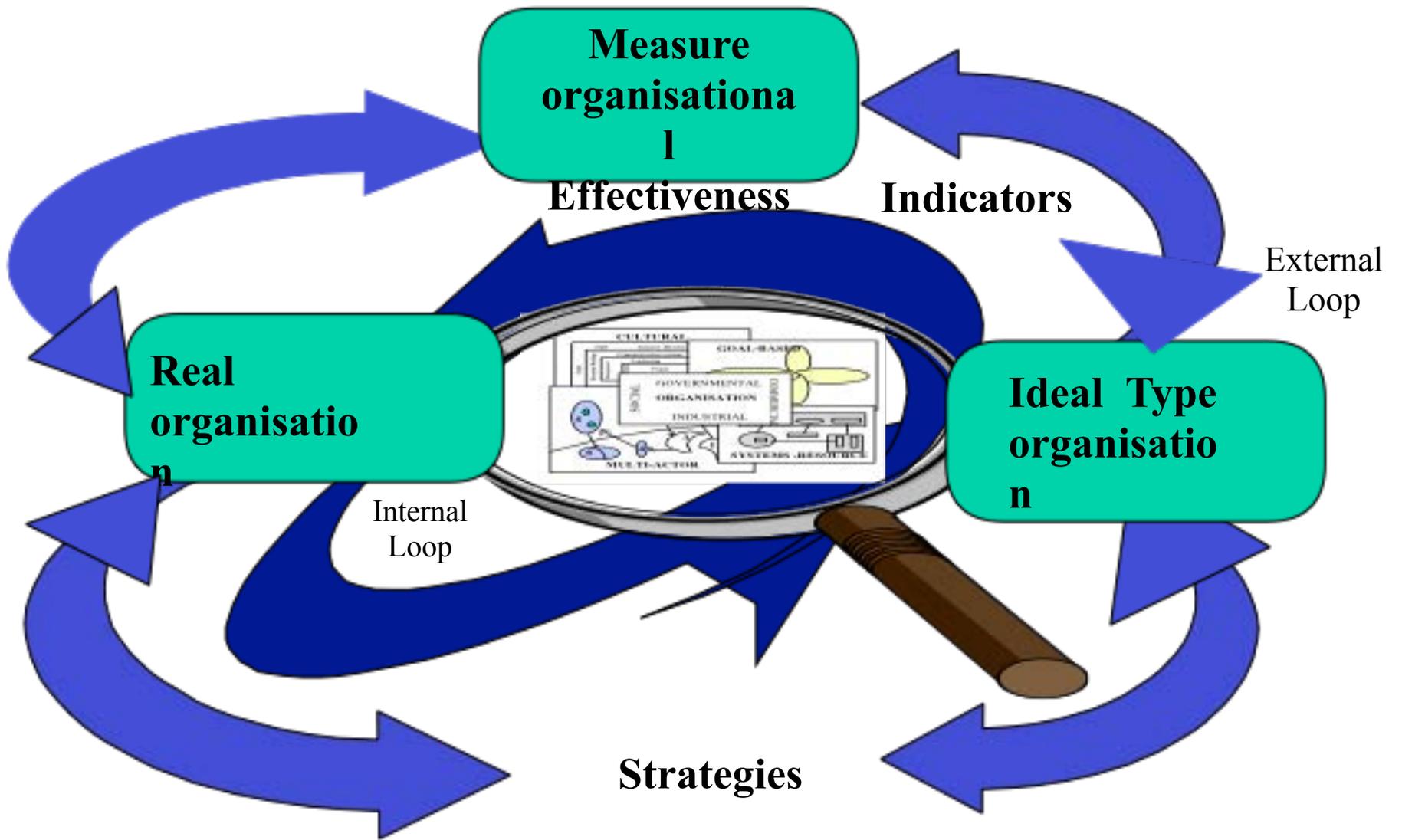
Evaluation Methodology	View of the Approach	Suggested Systems-Approach	Effectiveness is the organisation's ability to:
Goal-Based	Machine	Interactive Management	Achieve goals
Systems Resource	organisation as an Adaptive System	Viable Systems Model	Survive and adapt in a dynamic environment
Multi-Actor	Pluralistic System	Soft Systems Methodology	Satisfy the needs of all involved in its activities

Interactive Evaluation Management Process

- It interrelates and integrates the three evaluation methodologies (Goal-Based, Systems Resource and Multi-Actor evaluation methodologies)

It provides an overview of the present measuring effectiveness in the formulation, implementation and monitoring strategies

- It should be based on a series of input-output relationships derived from the strategy and split into the recursive organisation, including time estimation, quality and costs, as a result of the feedback





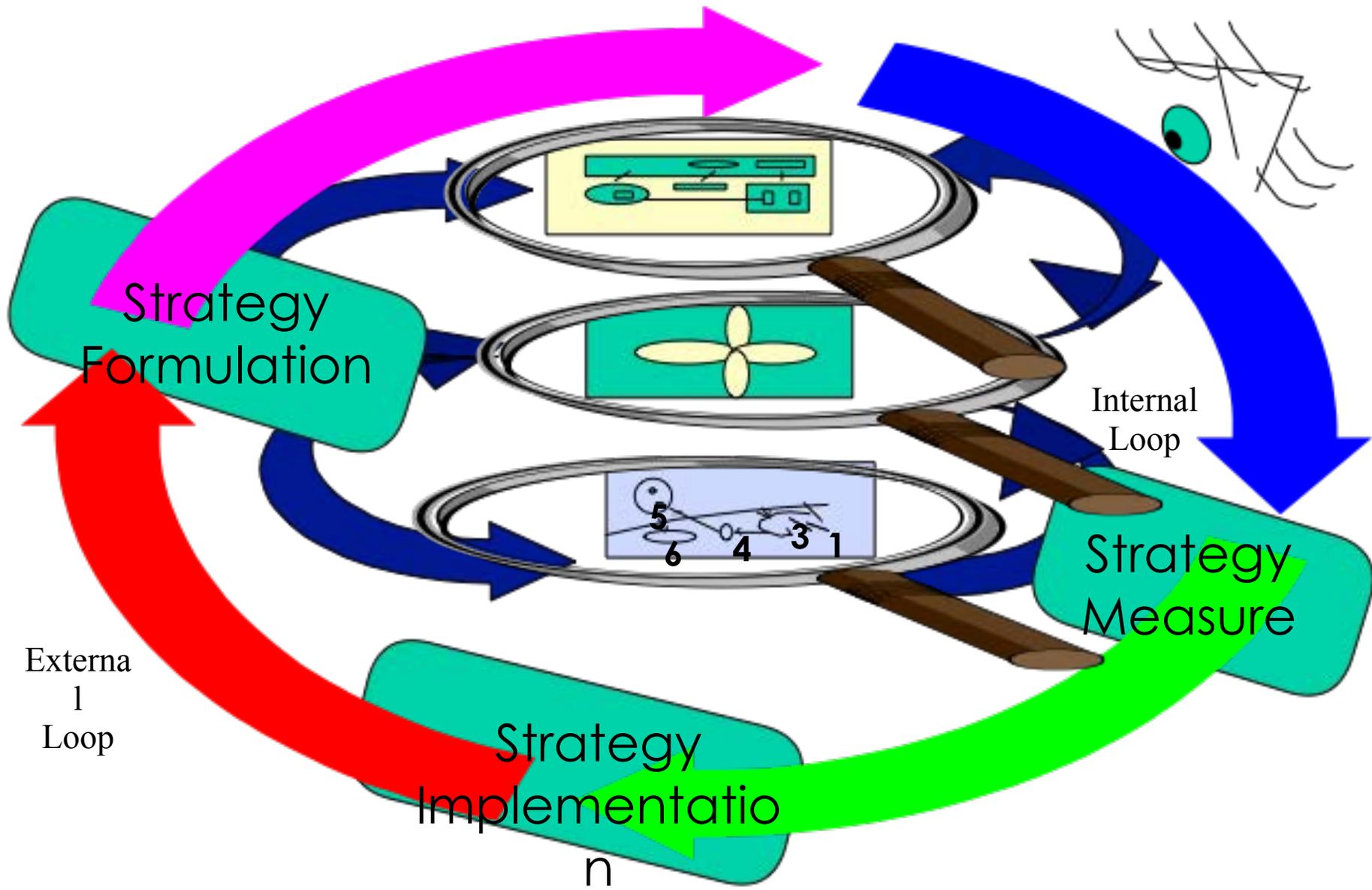
III. RELEVANT STEPS IN

AN EFFECTIVE

**IEMP AS A FRAMEWORK
TO SUPPORT THE**

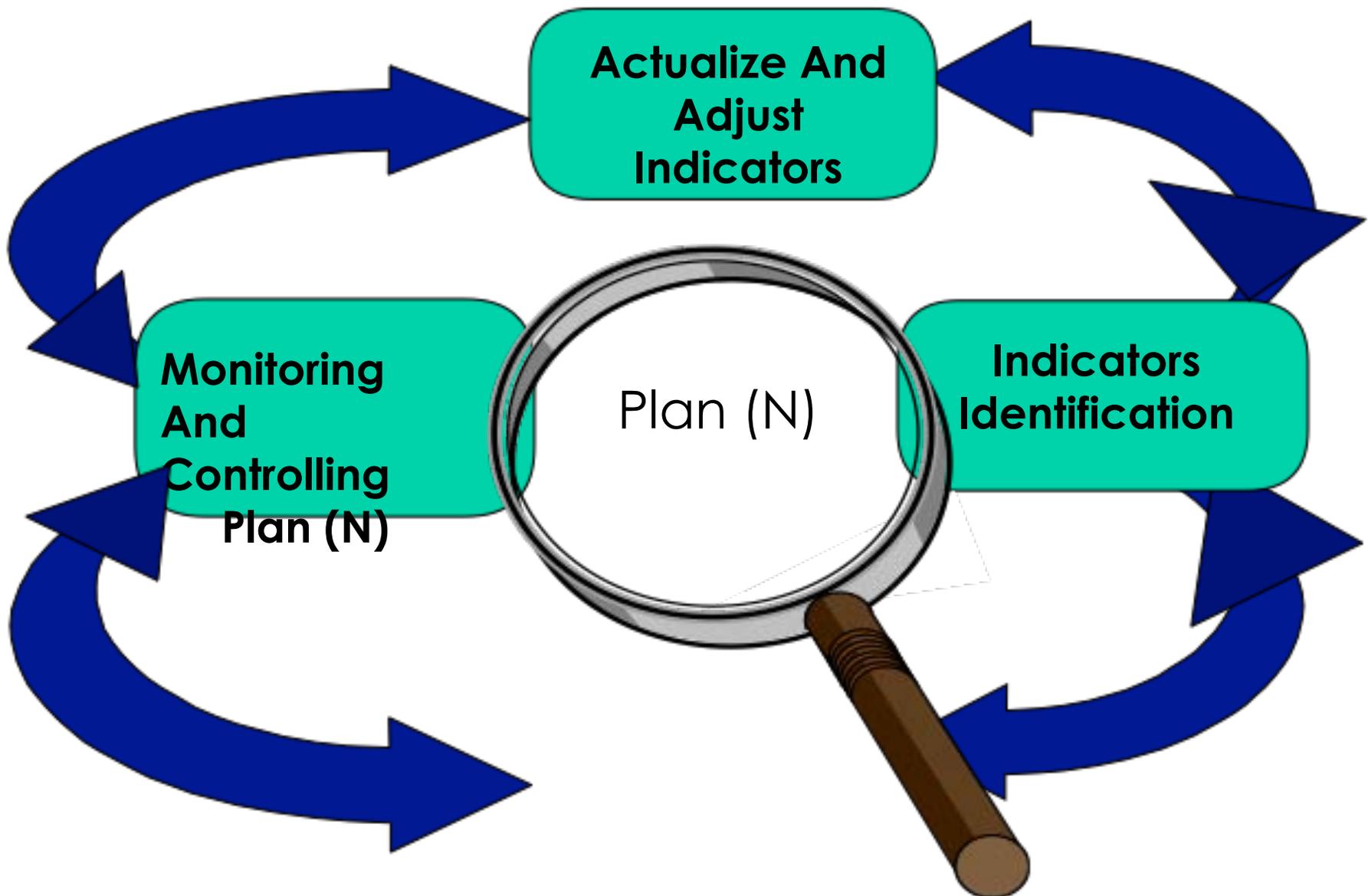
EVALUATION

METHODOLOGIES



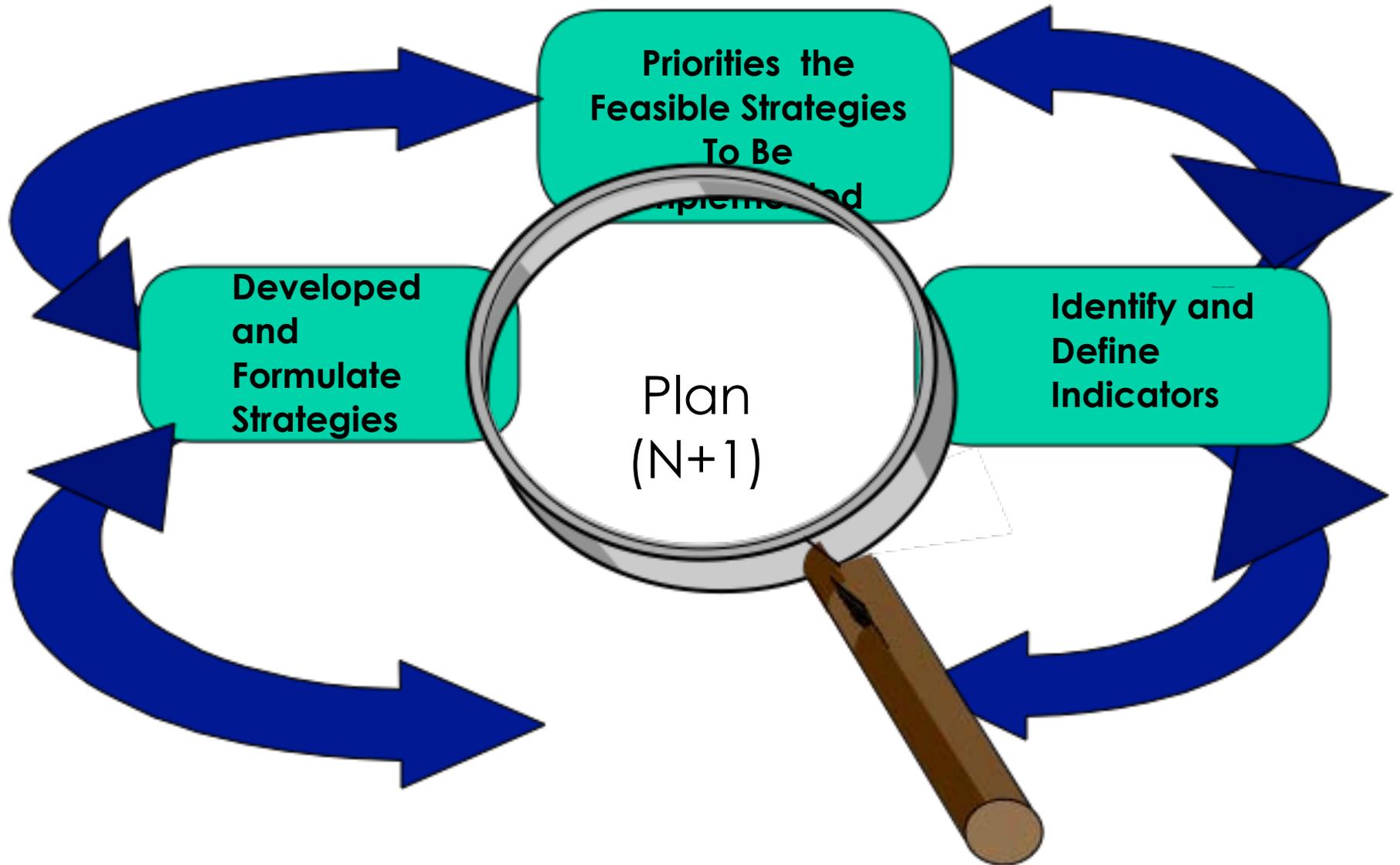
Strategy Implementation

- The Goal-Based Evaluation Methodology revalidates strategies, goals, objectives and targets if the desired results are to be achieved with efficiency
- It is important to actualize and adjust strategies and then to identify and measure the necessary indicators for monitoring and controlling the Goal-Based Statement Plan (N)



Strategy Formulation

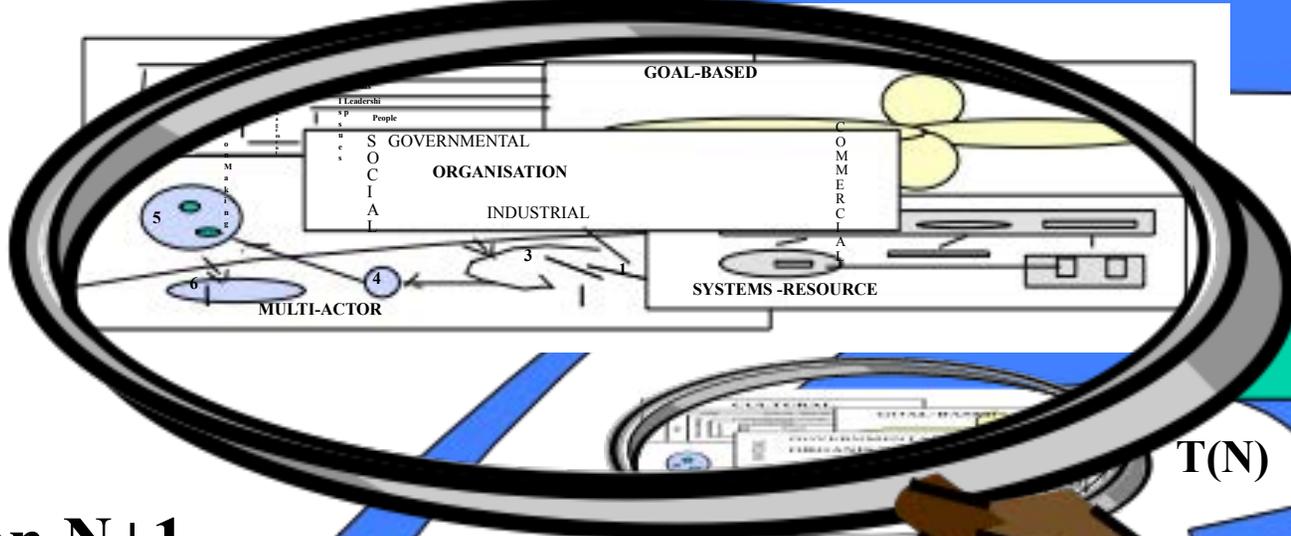
- It is the definition of Plan (N+1) as a result of using the different evaluation methodologies to formulate and develop the feasible strategies to be implemented and to identify and define measurement indicators
- The resources of the enterprise are used to optimize all opportunities and threats in the organisation given by the different methodologies



Strategy Measure

- It is a continuous monitoring and controlling of the strategic process in the short, medium and long term
- It is a circular process, which permits the adjustment of strategies interactive in time.
- The integration of Plan (N) and Plan (N+1) and their interrelationship on time make the IEMP a dynamic process. All the issues are constantly debated to attain continuous feedback for the process of collecting and adjusting information

Strategies



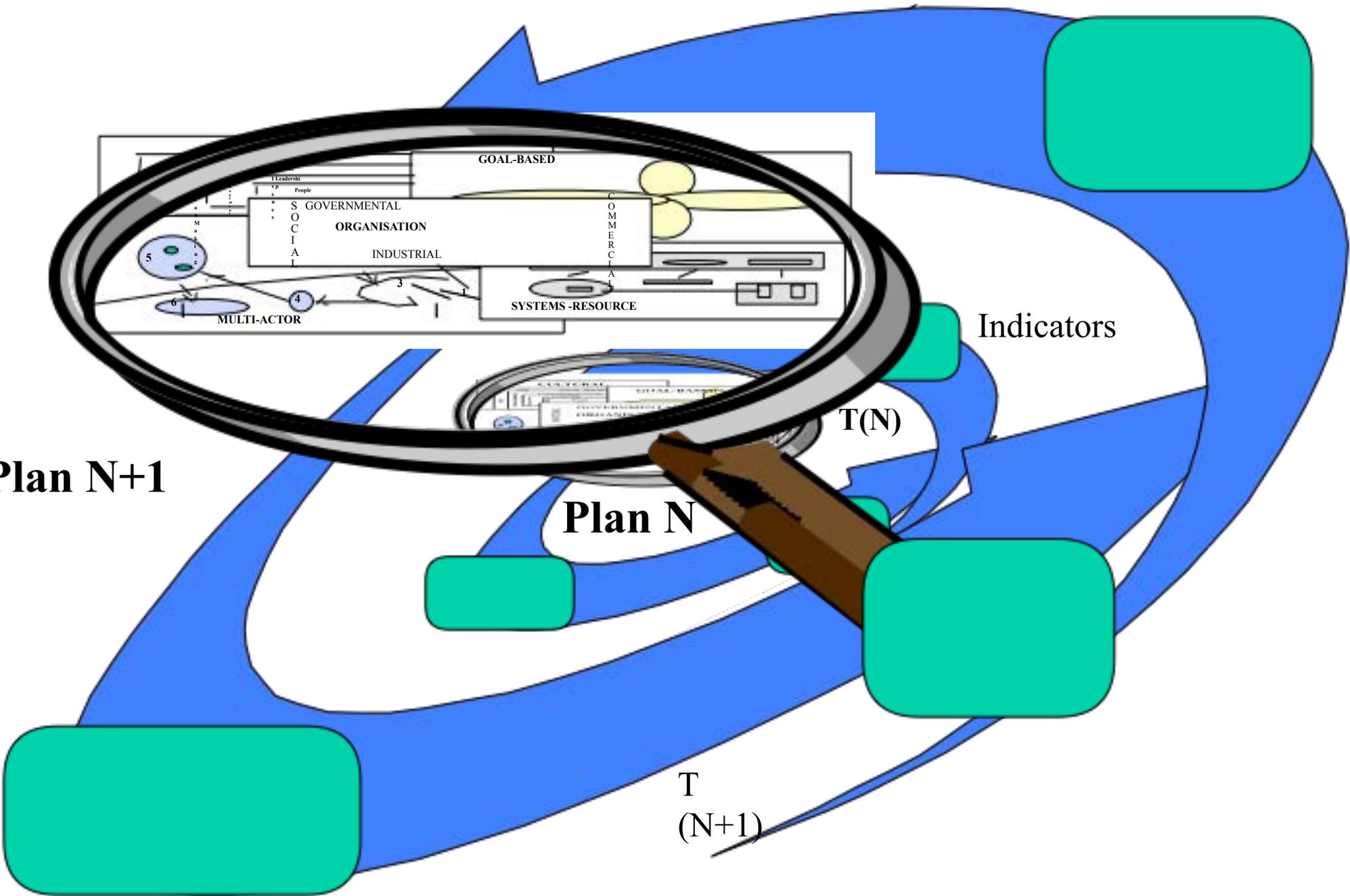
Indicators

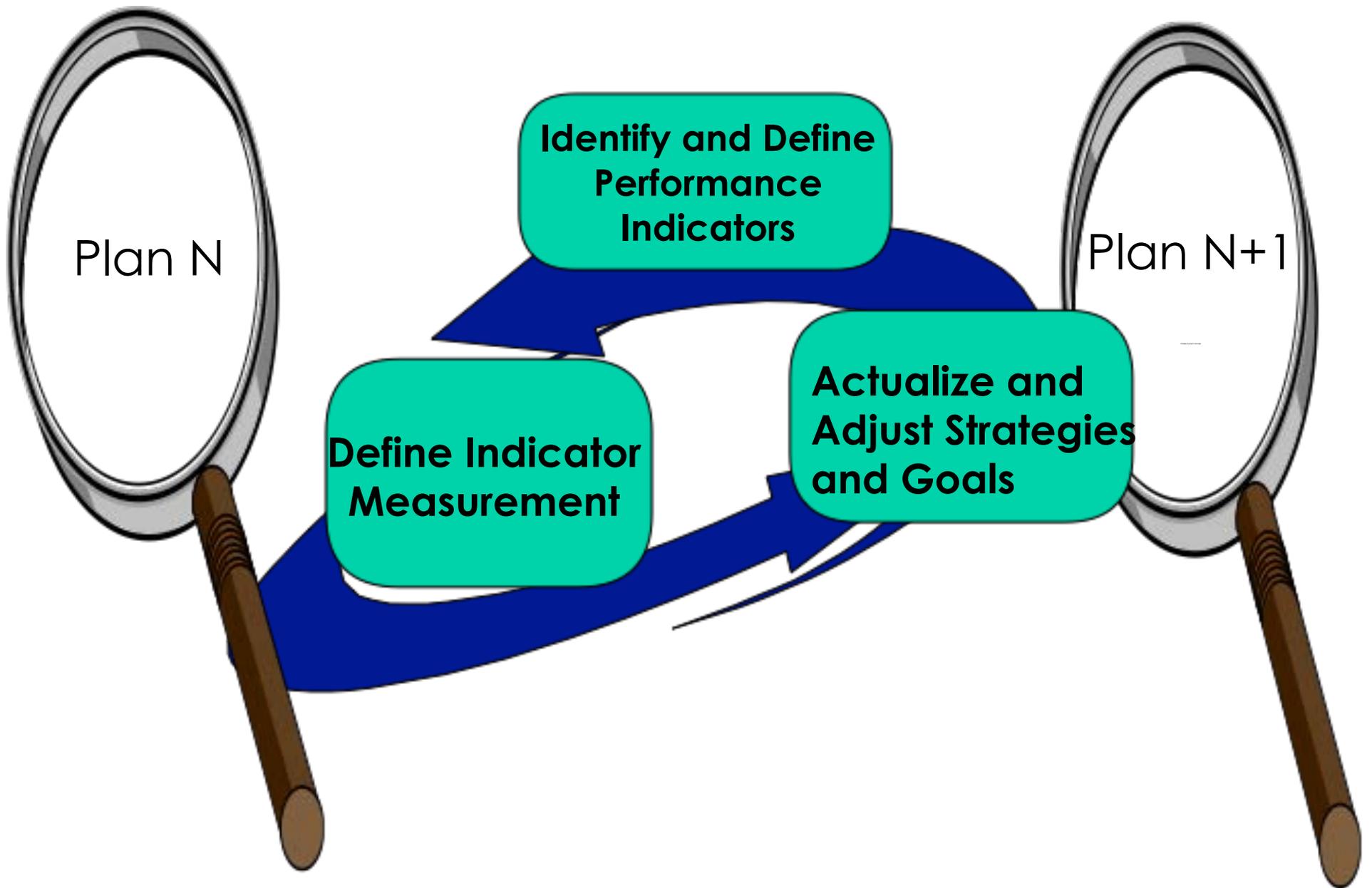
T(N)

Plan N+1

Plan N

T(N+1)





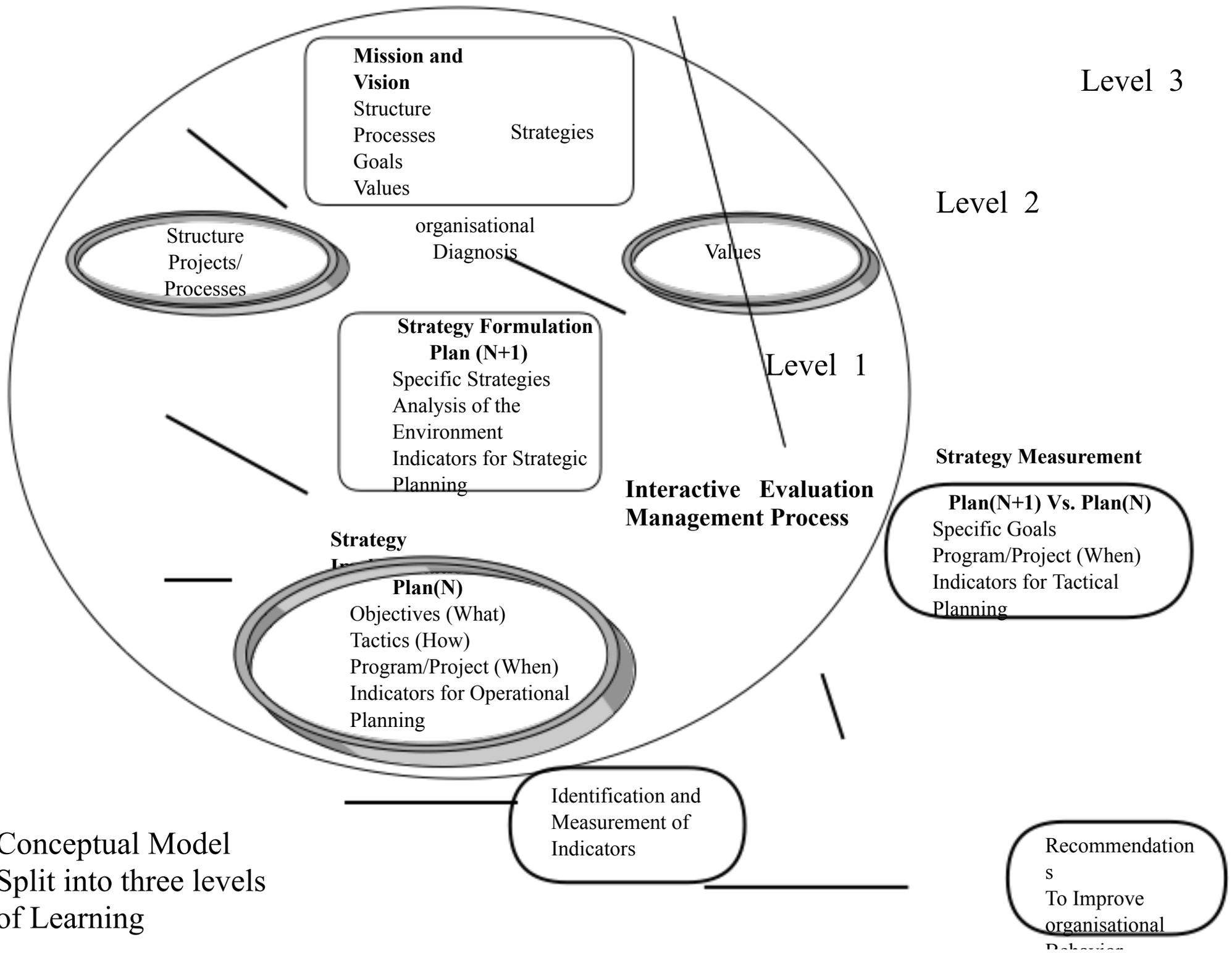
Plan N

**Identify and Define
Performance
Indicators**

**Define Indicator
Measurement**

**Actualize and
Adjust Strategies
and Goals**

Plan N+1

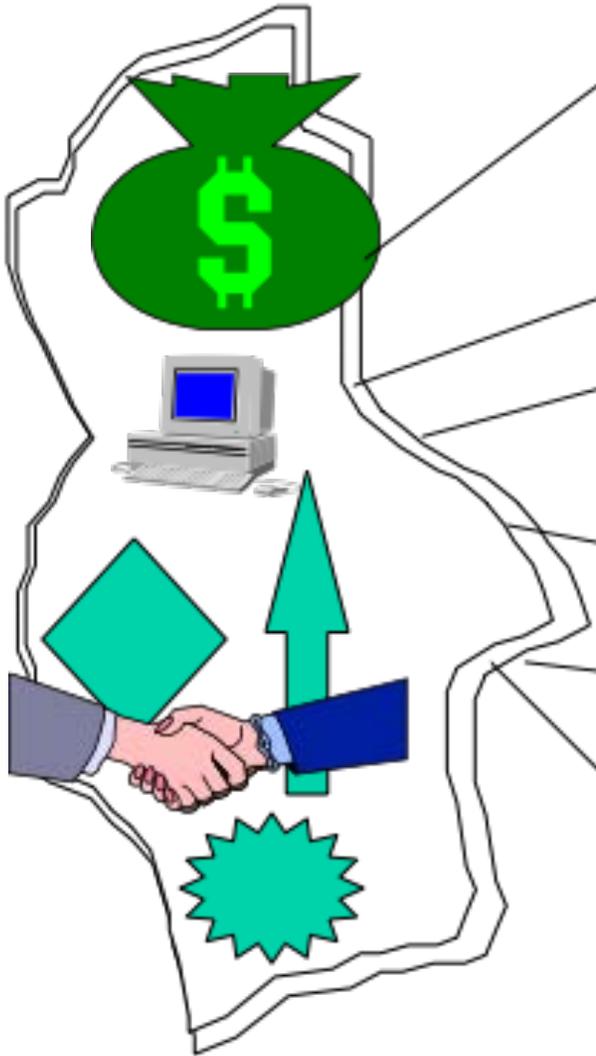


Conceptual Model
 Split into three levels
 of Learning

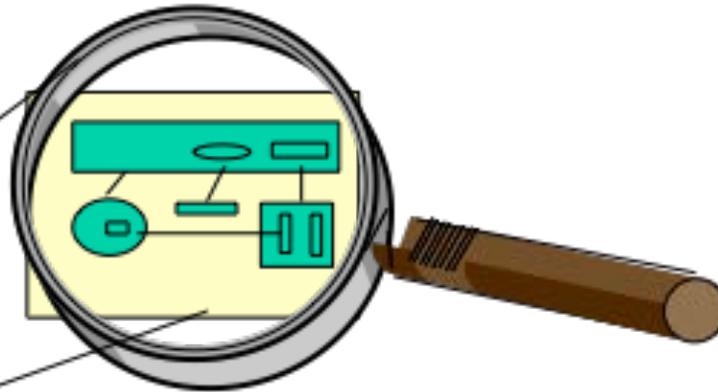


**IV. THE IMPORTANCE
OF
INDICATORS IN THE
IEMP**

Real System

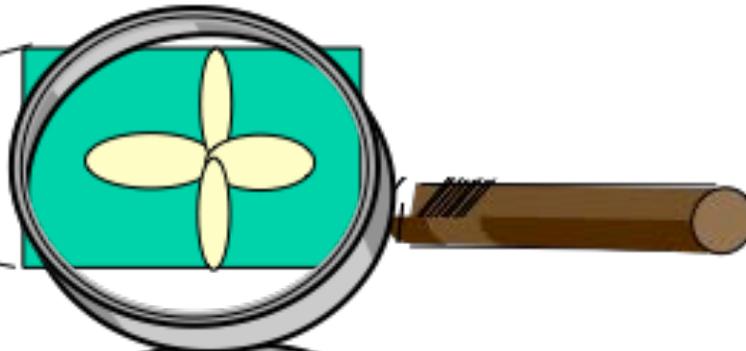


Ideal System

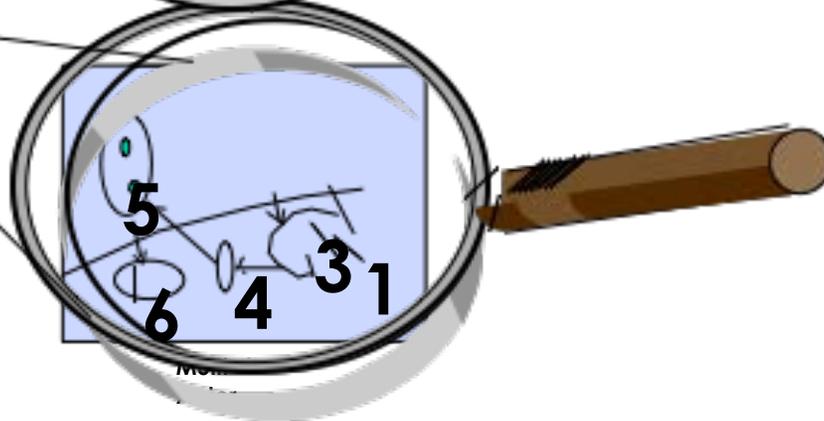


**Indicator
s**

Process



Strategies



Values

The importance of indicators in the IEMP



- The success of the Goal-Based Statement Plan depends on the defined indicators that should enable the detection of instabilities and stabilities emerging from the behavior of the resources used
- The best strategy emerges as a result of other recursion levels in the organisation according to Systems Resource Evaluation Methodology
- The survival of the organisation demands indicators that monitor how the individuals and organisations increase their capacity to learn and adapt

Measurement of Indicators



- According to the Goal-Based Evaluation Methodology it is essential for the executives to understand the need to develop new ways of designing or generating a Goal-Based Statement Plan, as well as how to analyze and evaluate this by means of Indicators.
- The Systems Resource Evaluation Methodology concentrates on structures and processes to make the organisation dynamic in achieving the plan.
- Multi-Actor Evaluation Methodology should be produced with the co-operation of stake-holders and individuals involved and their understanding of the organisation.

Measurement of Indicators



- The IEMP considers the complementarity of the three evaluation methodologies approaches.
- Complementarily evaluations have to be executed in a whole interactive process producing synergetic action in the organisation.
- The interrelation and integration of the three evaluation methodologies enriches the measuring of performance in the organisation
- Having an IEMP controlled and evaluated through indicators permits the successful development of corporate frameworks that need to be complemented through strategies



**V. ORGANISATIONAL
IMPROVEMENTS
THROUGH IEMP**



Observe

T(N)

Compare



T(N+1)



organisation

Diagnosis

Understand



T(N+2)

T(N+3)

Improve



T(N+4)

Improve the methodology

Learn through its use



organisation



Re-define the methodology

Use the methodology



VI. DISCUSSION

IMPORTANT POINTS FOR DISCUSSION

The need for different kinds of evaluation is a consequence of the different aims of the organisation as a whole

The different evaluation methods are based on different ways of viewing the organisation

